

Oracle Fusion Cloud Sales Automation

Sales Questions and Answers



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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 Sales Questions and Answers

What are the system requirements for Microsoft integration?

The system requirements are different based on which version of Oracle's Microsoft integration you're using.

- *Microsoft 365 for Oracle Redwood UX* or Oracle CX Sales for Microsoft 365 (previous version): See the section, *Microsoft 365 Integration System Requirements*.
- Oracle Sales Cloud for Outlook: See the section, *Oracle Sales Cloud for Outlook System Requirements*.

Microsoft 365 Integration System Requirements

The system requirements for the Microsoft 365 for Redwood UX and for the Oracle CX Sales for Microsoft 365 (previous version) integration are listed here.

Note: These requirements are for customers using Microsoft Exchange online with Oracle Sales. The Microsoft integration is also available for new and implementing customers – but only the Redwood UX version. Oracle CX Sales for Microsoft 365, the previous version, isn't available to newly implementing customers. For more information on the Microsoft integration in the Redwood UX, see the solution playbook, *How do I implement Microsoft 365 for Oracle Sales Redwood UX?* on the *Oracle Help Center Sales > Playbooks* page.

Email Client

You can use these versions of Microsoft Outlook using Microsoft Exchange Online (part of Microsoft 365), along with the latest updates:

- Outlook for Microsoft 365 version 1908 (Build 11929.20254) or higher for Windows (32 and 64 bit)
- Outlook version 16.36 (20041300) or higher for Mac (32 and 64 bit)
- Outlook on the web for Microsoft 365

Note: Incognito mode is not supported in browsers. Get the latest updates from Microsoft.

Exchange Server

- Microsoft 365 Exchange Online
- No support for On-Premises Exchange installs

Operating Systems

Any of these versions along with the latest hot fixes:

- Windows 10 version 1903 or higher
- Mac Mojave Version 10.14.6 or higher

Supported Browsers

To learn more about the supported browsers, see the topic, [Web Browser Requirements](#), in the Getting Started with Oracle Cloud Applications guide.

Server Configurations

We don't support:

- IMAP and POP3 email servers
- Terminal servers, such as Citrix® servers
- Remote Machines

Browser Trusted Sites

For desktop mode and Edge browser, add these domains as trusted sites:

- <https://outlook.office.com>
- <https://outlook.office365.com>
- Oracle Sales environment domain (example, https://*.oraclecloud.com)
- If you're using the Microsoft Edge browser, ensure that the browser includes the following trusted sites:
 - https://*.office.com
 - The Oracle Sales domain: for example: https://*.oraclecloud.com

Ensure that you select the **Enable Protected Mode** check box.

Oracle Sales Cloud for Outlook System Requirements

This version is for customers using Microsoft Exchange On-Premises and the Oracle Sales Cloud for Outlook add-in. The requirements for Sales Cloud for Outlook are listed here.

Note: This version isn't available for new and implementing customers.

Supported Operating Systems

- Microsoft Windows 7 SP1, 32-bit or 64-bit (x64)
- Microsoft Windows 8, 32-bit or 64-bit (x64)
- Microsoft Windows 8.1, 32-bit or 64-bit (x64)
- Microsoft Windows 10, 32-bit or 64-bit (x64)

Supported Microsoft Office Versions

- Microsoft Office 2007 SP2 and higher
- Microsoft Office 2010 (32-bit or 64-bit) build 14.0.4760.1000 and higher
- Microsoft Office 2013 (32-bit or 64-bit)
- Microsoft Office 2016 (32-bit or 64-bit)
- Microsoft Office 2019 (32-bit or 64-bit)

Supported Microsoft Exchange Server Versions

- Microsoft Exchange Server 2007 SP2

- Microsoft Exchange Server 2010
- Microsoft Exchange Server 2013
- Microsoft Exchange Server 2016
- Microsoft Exchange Server 2019
- Microsoft 365

Supported Outlook Profiles and Protocols

- Profile with a Microsoft Exchange email account configured in Cached Exchange Mode (OST). Outlook must be run with this profile at least once. Accounts with additional mailboxes are supported.
- Profile with an Internet email account. Outlook must be run with this profile at least once.
- VDI solutions such as Citrix are not supported.

The add-in can be installed in one of the Outlook profiles at a time.

Protocols

- POP3 is supported.
- IMAP is not supported.

Related Topics

- [What are the system requirements for Oracle CX Sales Mobile?](#)

What are the system requirements for Oracle CX Sales Mobile?

Here are the system requirements for Oracle CX Sales Mobile:

Apple Devices

- iOS 12.1 or higher

Android Devices

- Android OS 8.0 or higher

Related Topics

- [What are the system requirements for Microsoft integration?](#)

How do I configure real-time and near real-time access for access group object records?

Using profile options, you can implement real-time and near real-time processing for objects secured using access groups.

These options let you:

- Enable real-time processing of object records secured using access groups, so that when new object records are created, the records are immediately accessible on the UI to the creator of the object record.

Real-time processing is supported for all access group objects.

- Enable near real-time processing for objects, so that when object records are created or updated, the new records are accessible in near real-time to all users who have the privileges to view them.

Near real-time processing is supported for these objects:

- Account
- Activity
- Campaign
- Contact
- Custom objects
- Deal Registration
- HR Help Desk Request
- Internal Service Request
- MDF Budget
- MDF Claim
- MDF Request
- Lead
- Opportunity
- Partner
- Program Enrollments
- Service Request

The real-time processing options are enabled by default. However, to enable near real-time processing of object records, there are some extra steps for you to perform.

Configure Real-Time Processing of Object Records

Two profile options control the real-time processing of object records that are secured using access groups:

- Real-Time Transaction Tracking Enabled (ORA_ZCA_TRANSACTION_TRACKING_ENABLED)

- Real-Time Transaction Tracking for Access Groups Enabled (ORA_ZCA_ACCESS_GROUPS_TRACKING_ENABLED)

Both of these profile options are enabled by default at the site level so that real-time processing is enabled for all users. In general, you won't need to change the default values for these profile options, but you can disable real-time processing for all users at the site level, or for individual users at the user level, if necessary.

For example, you might want to disable real-time processing for a specific user who needs to import bulk data into the application. In cases like this, disable both profile options for the user using these steps:

1. From **Setup and Maintenance**, navigate to the **Manage Administrator Profile Values** task.
2. Search for the profile option name, for example, Real-Time Transaction Tracking Enabled.
3. In the Profile Values section, select **New** from the **Actions** menu.
4. In the Profile Level field, select **User**.
5. In the User Name field, search for and select a user, then click **OK**.
6. In the Profile Value field, select **No**.
7. Click **Save and Close**.
8. Repeat steps 2 - 7 for the Real-Time Transaction Tracking for Access Groups Enabled profile option.

Configure Near Real-Time Processing of Object Records

You can access records that are secured using access groups in near real-time, for objects that support near real-time processing. New object records are immediately available on the UI, without needing to run the Perform Object Sharing Rule Assignment Processing scheduled process, in these circumstances:

- When a new object record is created, when a user is added to or removed from the team associated with an object, or when the owner of an object record is changed
- When an object record is updated, when a user gets access to an object record through a hybrid rule, or when an access extension rule provides a user with access to an object related to the supported object

Note: Near real-time processing isn't supported for object records that are created or updated because of territory assignment processing. To see these types of changes on the UI, you must run the Perform Object Sharing Rule Assignment Processing process.

To implement near real-time processing for supported objects, both of these profile options need to be enabled:

- Near Real-Time Transaction Tracking for Access Groups Enabled (ORA_ZCA_ACCESS_GROUPS_NEAR_REAL-TIME_TRACKING_ENABLED)

This option is enabled at the site level by default.

- Common CRM Signals Active (ORA_ZCA_ENABLE_SIGNALS).

This option is disabled by default.

Enable the Common CRM Signals option to implement near real-time access for object records:

1. From **Setup and Maintenance**, navigate to the **Manage Administrator Profile Values** task.
2. Search for the profile option name, Common CRM Signals Active.
3. In the Profile Values section, select the **Site** profile level, then change the default value of the Profile Value field to Yes.
4. Click **Save and Close**.

Related Topics

- [How do I create and manage access groups?](#)
- [How do I create membership rules for custom access groups?](#)
- [Can I rename a custom role in an access group?](#)
- [How do I enable team-based access to custom objects when using access groups?](#)

What can I use the Security Console for?

Use the Security Console work area to perform most security-management tasks.

Security Console Tasks

You can do these tasks on the Security Console:

- Review role hierarchies and role analytics.
- Create and manage custom job, abstract, and duty roles.
- Review the roles assigned to users.

Note: You use the Manage Users work area, not the Security Console, to create users and to provision users with roles.

- Compare roles.
- Simulate the Navigator for a user or role.
- Manage the default format of user names and the enterprise password policy.
- Manage notifications for user-lifecycle events, such as password expiration.
- Manage PGP and X.509 certificates for data encryption and decryption.

Note: Oracle Sales and Fusion Service don't use certificate functionality.

- Set up federation and sync user and role information between Oracle Applications Security and Microsoft Active Directory, if appropriate.

Security Console Access

You must have the IT Security Manager job role to use the Security Console. You open the Security Console by clicking the **Security Console** link within the **Tools** menu in the Navigator. These tasks, performed in the Setup and Maintenance work area, also open the Security Console:

- Manage Job Roles
- Manage Duties
- Manage Data Security Policies

You may also be interested in reviewing the article, [How to Audit Security Customization \(Role Creation, Role Modification, Role Membership, Entitlement/ Privilege Changes\) in Fusion Application \(Doc ID 2175861.1\)](#), on My Oracle Support.

Why isn't an account created when I create a contact?

When you add a new Sales contact as part of creating an email – and neither the contact or an associated account exist in Sales – you can create the contact on-the-fly, but you can't create the account as part of this flow. However, after creating the contact, you can open the contact in the web application using the Open in CX Sales action and quickly create the account.

How can I see the Party ID of the Sales owner of a contact?

You can see the PartyID of the Sales owner of a contact using Microsoft 365 Designer.

1. Enter a publishable sandbox.
2. In Application Composer, expand **Contacts** and click **Fields**.
3. Create a formula field of type Text with the API Name of `contactPartyId`, a DisplayLabel of `Contact Party Id`.
4. Check **Include in Service Payload**, and then use this Groovy script: `if (PartyId) return PartyId;`
5. Save your work.
6. Navigate to **Productivity Applications Setup > CX Sales for Microsoft 365**.
7. In the Microsoft 365 Designer, expand **Contacts**
8. Duplicate the standard layout.
9. Drag and drop **PersonDEO_ContactPartyId_c** from the Available Fields onto the custom layout.
10. Save your changes.
11. Contact Party ID appears in your Contacts custom layout in the add-in.
12. Publish the sandbox according to your company's business practices.

Can I modify a deep link to navigate to a specific activity from Workspace?

Yes. You can open a specific activity based on the activity ID from the Accounts page in Workspace using a deep link. For example, this sample URL syntax allows direct links to the Activities subtab from the Account:

```
https://<hostname>:<port>/crmUI/faces/FuseOverview?
fndGlobalItemId=itemNode_workspace_workspace&fndTaskItemId
=ZCA_CC_INTERACTIVE_UI_CRM&fnd=%3BentityName%253DAccount%253BsubTabName%253DActivities%253BrecordId
%253D@{1}%253B%3B%3Bfalse%3B256%3B%3B%3B
```

If you want to open a specific activity based on the activity ID, you replace the `<RecordId>` with the actual value of the `<ActivityId>`. However, you must first use the CAST function as follows:

```
CAST("Activity"."Activity Id" AS NUMERIC)
```

This converts the ID from a text data expression to a numeric value so that you can use the numeric value to navigate to the specific activity you want.

How do I configure address regions for accounts and contacts?

You use the Address object in Application Composer and the Manage Address Formats task in Setup and Maintenance to configure address regions for accounts and contacts.

You can add or remove custom fields or standard fields (such as Type, D-U-N-S Number, Site Name, Site Number, and so on) in the address region.

Note: Use Application Composer to add or remove fields in the address region. We recommend that you don't use the Page Composer for this purpose.

Location-specific fields (such as Address Line1, Address Line2, City, State, Postal Code, and so on) need to be managed using the Manage Address Formats task in Setup and Maintenance. The fields configured in the Manage Address Formats task can't be managed using the Application Composer.

When creating or editing accounts or contacts, salespeople can't save addresses by entering only address fields – they must also enter location-specific fields. This rule applies to both standard and custom mandatory attributes on the Address object that have been exposed using Application Composer.

To display the address region in a collapsed manner, select the Disclosed option of the address component on the page composer.

How do I create and change sales statuses for my opportunity?

Opportunities and product lines on opportunities have statuses, such as Lost, No Sale, Open, and Won. You can create sales statuses or update existing ones, as long as you stay within the predefined categories.

Before you start

Salespeople can select statuses for an opportunity or for a product line while editing an opportunity. The application can set statuses automatically when synchronizing an opportunity and its product lines. The application uses status categories when calculating Business Intelligence metrics for win/loss analysis.

Predefined Sales Statuses and Status Categories

The application comes with four predefined sales statuses and status categories. The predefined statuses are part of larger status categories. Status categories aren't visible in the UI, but statuses are.

To change statuses, you can create statuses and then associate them with existing status categories. You can't add new status categories.

This table shows the predefined statuses and categories:

Status Code, Status, and Category	Meaning
Lost	Opportunity is closed without proceeding to a sale and lost to competitors, if any
No Sale	Opportunity is closed and not pursued
Open	Time between when a potential sales is realized and the customer decision on the sale is obtained
Won	Opportunity is closed with a buying decision from the customer and won over competitors, if any

Create and Change Sales Statuses

You can create sales statuses or update existing ones, as long as you stay within the four predefined categories. You also can mark statuses as inactive or active. Inactive statuses don't display in the UI.

These rules apply when creating sales statuses:

- Statuses must belong to one of the predefined status categories.
- The Status values display in alphabetic order on the UI.
- Status codes must be unique and can't be blank.
- The Status value must be unique and can't be blank.
- At least one active status in the Open status category must exist.

Oracle recommends that you retain the predefined status codes. As a best practice, to configure statuses, create more codes. Don't deprecate or replace existing status codes.

Here's how to change sales statuses:

1. In the Setup and Maintenance work area, go to:
 - Offering: Sales
 - Functional Area: Opportunities
 - Task: Manage Sales Status
2. In the Manage Sales Statuses page click the **Add** icon to add a new status and:
 - a. Enter a new **Status Code**.
 - b. Enter a new **Status**. This is the value that displays in alphabetic order in the opportunity pages.
 - c. Select the **Active** checkbox.
 - d. Select from one of the predefined values for **Status Category**.
3. To change an existing status, click in the row of the status so that it becomes editable and change the values as you want.
4. Save your changes.

This figure shows the Manage Sales Statuses page with a new status added named "Abandoned".

Manage Sales Statuses

Sales Statuses

Actions ▾ View ▾ Format ▾ + 

Status Code	Status	Active	Status Category	Description
ABANDONED	Abandoned	☒	Lost ▾	Custom status for abandoned
LOST	Lost	☒	Lost	Seeded Lost status for opportunity
NO_SALE	No Sale	☒	No sale	Seeded No Sale status for opportunity
OPEN	Open	☒	Open	Seeded Open status for opportunity
WON	Won	☒	Won	Seeded Won status for opportunity

How do I edit Adaptive Search parameters?

You can configure how Adaptive Search works and control how the Workspace interface operates using the Parameters tab available in the Adaptive Search setup page.

Modify the parameters to define the way the Adaptive search engine operates and runs the search indexing. For example, you can perform a partial publish to enable you to publish only those objects that have configuration modifications. This avoids having to perform a full publish every time a configuration change is done thus saving time.

Some of the parameters you can modify include timeouts, fetch sizes, maximum number of batches and so on. You can change parameters so that the indexing process runs successfully based on the server size and the volume of data to be indexed.

Parameter settings include the ability to enable mass actions and record-level navigation, specify the fuzziness level for search, set the default number of records to be displayed per page, and set the maximum number of records to export at one time. For example, you might want to modify parameter values for the following:

- Set the maximum columns allowed in the Workspace list page
- Enable Group By in Workspace
- Enable Mass Actions
- Enable Mass Update
- Enable record level navigation
- Fuzziness Level
- Maximum Number of Records for Export
- Number of records displayed per page in Workspace
- Enable Partial Publish

You can also choose to change current and default values. Here's how to edit Adaptive Search parameters.

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to:
 - Offering: Sales
 - Functional Area: Sales Foundation
 - Task: Configure Adaptive Search

- On the **Configure Adaptive Search** page, click the **Parameters** tab.

Parameter Name	Minimum Value	Maximum Value	Default Value	Current Value
Decouple incremental job at the end of Publish	-	-	N	N
Enable Group By in Workspace	-	-	N	Y
Enable Keyword Highlighting in Workspace	-	-	Y	Y
Enable Mass Actions	-	-	Y	Y
Enable Mass Update	-	-	N	Y
Enable record level navigation	-	-	Y	Y
Fuzziness Level	None	Two	One	One
Lookup Type Cache Concurrency Level	1	10	2	2
Lookup Type Cache Initial Capacity	16	10000	16	16
Lookup Type Cache Load Factor	0.5	1.0	0.75	0.75
Maximum Number of Records for Export	1	10000	2000	2000
Maximum number of records that can be selected in Workspace	1	25	10	10
Enable Partial Publish	-	-	Y	Y
Search Filter Limit	1	10	6	6
Shard maximum size required for index in GB	1	9999	45	45

- Highlight the **Parameter Name** that you want to change and click **Edit**. This warning is displayed.

You're about to change parameters that control how Adaptive Search works. Changes should only be carried out by search setup experts. Do you want to continue?

- Click **Yes**.
- In the **Current Value** field, makes the changes that you require and click **Save and Close**.

This table outlines the list of Adaptive search parameters available and shows the minimum, maximum, and default values.

Parameter Name	Description	Minimum Value	Maximum Value	Default Value
Decouple incremental job at the end of Publish	At the end of a Publish process, a periodic refresh is run so that any records updated during the Publish process get updated. By default the decouple parameter is set to N which means that the periodic job is run after the Publish process. Change this parameter to Y if you don't want the periodic process to run.	None	None	N
Enable Group By in Workspace	Enable this parameter to view search results in groups based on specific fields on the object or related objects. Salespeople get an overview of the number of records in each Grouped By grouping and they can search and filter records within these groupings.	None	None	N

Parameter Name	Description	Minimum Value	Maximum Value	Default Value
	They can also view aggregates such as count, average, and sum of values on the records of each group.			
Enable Keyword Highlighting in Workspace	Setting this parameter means that any keywords entered in the Search box are highlighted in the search results returned in Workspace.	None	None	Y
Enable CJK Language Detection for Non-Translatable Fields	You can perform a search on untranslatable name fields such as Account Name or Contact Name that contain Chinese, Japanese and Korean characters.	None	None	N
Enable Mass Actions	You can perform some actions on multiple records at the same time. For example, you can select multiple leads in Workspace and qualify them at once by selecting the Qualify action.	None	None	Y
Enable Mass Update	You can update multiple records at the same time. This saves you time and helps improve efficiency. For example, you might want to update the close date for opportunity records at the same time or change the Lead rank from Cool to Warm for a number leads. Use the Configure UI tab from the Configure Adaptive Search page to specify which fields to enable for mass update. In addition, ensure that you select the Enable for Mass Update checkbox and have at least four fields selected for both standard and custom objects. Note: If the parent (controlling) attribute isn't enabled in Adaptive Search, the child (controlled) attribute can't be enabled for mass update. For example, let's say the controlling attribute of Sales Method is Opportunity Type. If Opportunity Type isn't enabled in Adaptive Search, then Sales Method won't be available to be enabled for Mass Update.	None	None	N
Enable record level navigation	You can use Previous and Next buttons on the record details page to navigate lists of records in Workspace.	None	None	Y
Enable Partial Publish	Set this parameter to do a publish on selected set of objects without doing a full publish.	None	None	N

Parameter Name	Description	Minimum Value	Maximum Value	Default Value
Fuzziness Level	This parameter defines the number of character edits that's considered when a keyword search is performed. For a value of 1, the search term "redwood" returns Redwood in the search result.	None	Two	One
Initial target shard size required for index in GB	This parameter lets you set the initial target shard size for your search index file. 30 GB is the predefined value.	1	9999	30
Lookup Type Cache Concurrency Level	You can configure the Adaptive search lookup caching to build pipelines concurrently when the lookup table or index file is large. The default number of pipelines is 2.	1	10	2
Lookup Type Cache Initial Capacity	Set the initial capacity for the concurrent hash map that's used for the lookup type cache.	16	10000	16
Lookup Type Cache Load Factor	You can modify the cache load factor for the lookup type cache. The default factor is 0.75.	0.5	1.0	0.75
Maximum Number of Columns to Optimize Column Sizing in Workspace/List Page	Select the maximum number of columns for optimal sizing in Workspace list pages. The default is 8 columns to optimize column sizing.	1	20	8
Maximum columns allowed in the Workspace/List Page	Adjust the number of saved search columns to display in Workspace list pages. The default is 20 columns.	1	40	20
Maximum Number of Records for Export	This parameter represents the maximum number of records to save to the desktop in a single Export action by users.	1	10000	2000
Maximum number of records that can be selected in Workspace	This parameter enables you to change the maximum number of records that can be selected in Workspace to perform a mass action. The default number is 10 records and you can select up to 25 records.	1	25	10
Minimum Characters to type in Search Box before Suggestions Filters are displayed	This parameter lets you change the minimum number of characters that you must include in the Search box before the suggestion filters are displayed. The default minimum value is 1 character. A value of 0 means the Filter Suggestions display immediately on clicking in the search box.	0	100	1

Parameter Name	Description	Minimum Value	Maximum Value	Default Value
Number of records displayed per page in Workspace	You can change the number of records displayed on the search results page from the default value of 25 records up to a maximum of 100 records.	1	100	25
Screen Width in Pixels to Optimize Column Sizing in Workspace/List Page	Adjust the screen width in pixels to optimize the size of columns displayed in Workspace list pages. The default value is set as auto, which means that the screen will automatically adjust to the number of columns on the page.	1280	3840	Auto
Search Filter Limit	Set the number of filters you can include for your search. The default number of filters is 6.	1	10	6
Shard maximum size required for index in GB	This parameter lets you set the shard maximum size for your search index file in gigabytes (GB).	1	9999	45

Related Topics

- [How do I access Workspace data offline?](#)

What's lock assignment?

The Lock assignment check box is automatically selected when you run a manual assignment from the UI. Lock assignment prevents a salesperson from being automatically removed from an opportunity through the assignment engine.

Only users with Full access on the opportunity can select or deselect the Lock Assignment check box for sales team members. Resources are assigned automatically to an opportunity during an automatic assignment process or through a groovy script.

When the lock assignment is selected, an automatic territory assignment can't remove any sales account team resources or team members. If the lock assignment is deselected, team members may be replaced if they no longer match the assignment rules.

Note: The Lock Assignment check box is not available by default and must be added to the Team subtab within the Edit Opportunity page using Application Composer. See the next section for more information.

Extending Pages for Opportunities Using Application Composer

1. In a sandbox, navigate to **Configuration > Application Composer**.
2. In the object tree, select **Opportunity > Pages > Application Pages**.
3. Go to the Create Opportunity page and duplicate the standard layout.
4. Edit the layout.

5. In the Configure Detail Form region of the Opportunity Create page, move the Lock Assignment field from the Available Fields to the Selected Fields list.
6. Save your changes.
7. Publish the sandbox according to your company's business practices.

How can I differentiate between copied Opportunities and Opportunities created using Create button?

You can create a Groovy script to help you identify opportunities that were copied from those opportunities that were created using the Create button from the UI.

Here's how.

1. Navigate to the Opportunity object in Application Composer.
2. Create a custom field called **OptyIdCopyText** and enter the expression **getAttribute(OptyId)exp** as its default value.
3. From Server Scripts area, insert the following sample Groovy script before the insert trigger. This script differentiates between copied Opportunities and Opportunities created using **Create** from the UI.

```
if (OptyId.toString().equals(OptyIdCopyText_c)) {  
  
    return false  
  
}  
else  
{  
    setAttribute('DateatSalesStage1_c', null)  
    setAttribute('DateatSalesStage2_c', null)  
    setAttribute('DateatSalesStage3_c', null)  
    setAttribute('DateatSalesStage4_c', null)  
    setAttribute('DateatSalesStage5_c', null)  
    setAttribute('DateatSalesStage6_c', null)  
  
}
```

4. Click **Save and Close**.

For more information about groovy scripting, see the [Oracle Applications Cloud Groovy Scripting Reference](#).

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 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'll also require the `ORA_CRM_EXTN_ROLE` role.

Here's how to access the routines dashboard:

1. Open Sales Administration by selecting **Configuration > Sales Administration** in the Navigator menu.
2. Click **Routines** to open the Routines dashboard.

Note: If you've access, then you can also access routines from Application Composer by selecting **Configuration > Application Composer > Routines**.

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:

The screenshot displays the Oracle Sales interface for 'The New Walt Disney Company'. At the top, there is a header bar with the company name, industry (Amusement Parks and Arcades), address (500 S Buena Vista St, Burbank, CA), website (http://www.thewaltdisneycompany.com), owner (Alicia Wu), and a rollup for 'Hierarchy Number of Open Activities' with a value of 4. Below the header is a search bar with the placeholder text 'Try searching for an action'. The main content area is divided into four panels: Opportunities, Leads, Service Requests, and Assets. The Opportunities panel shows a rollup for 'Open Opportunities' with a value of \$100,000 and a 'Hierarchy Open Opportunity Revenue' rollup with a value of 146,000. The Leads panel shows two leads: 'Disney - Sentinel Power Server 3000' and 'Walt Disney - Ultra Power Server'. The Service Requests panel shows a rollup for 'Open Critical Service Requests' with a value of 1, a rollup for 'Open Service Requests' with a value of 3, and a 'Hierarchy Number of Open Service Requests' rollup with a value of 5. The Assets panel is currently empty.

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:

Edit Account: The New Walt Disney Comp... : Rollups ☆

Actions ▼
Save
Save and Close
Cancel

Contacts
Assets
Opportunities
Leads
Relationships
Service Requests
Notes
Assessments
Activities
Interactions Hist...
Rollups

No search fields added.
Add ▼
Search
Create

View ▼

Hierarchy Number of Open Activities	Hierarchy Number of Open Leads	Won Opportunity Revenue	Number of Open Hot Leads	Number of Touches	Won Order Amount	Number of Open Service Requests
4	15	\$100,000	25	15	\$25000	3

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

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 When you unpublish or delete a rollup, the Data Cleanup scheduled process prompts you to clear the data.	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.
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 <i>Configuring Applications Using the Application Composer</i> guide.
4	Classic user experience (Preferred)	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 experience (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.	Settings and Actions > Edit Page in Visual Builder	See these topics in the Extending Sales in the Redwood user experience guide:

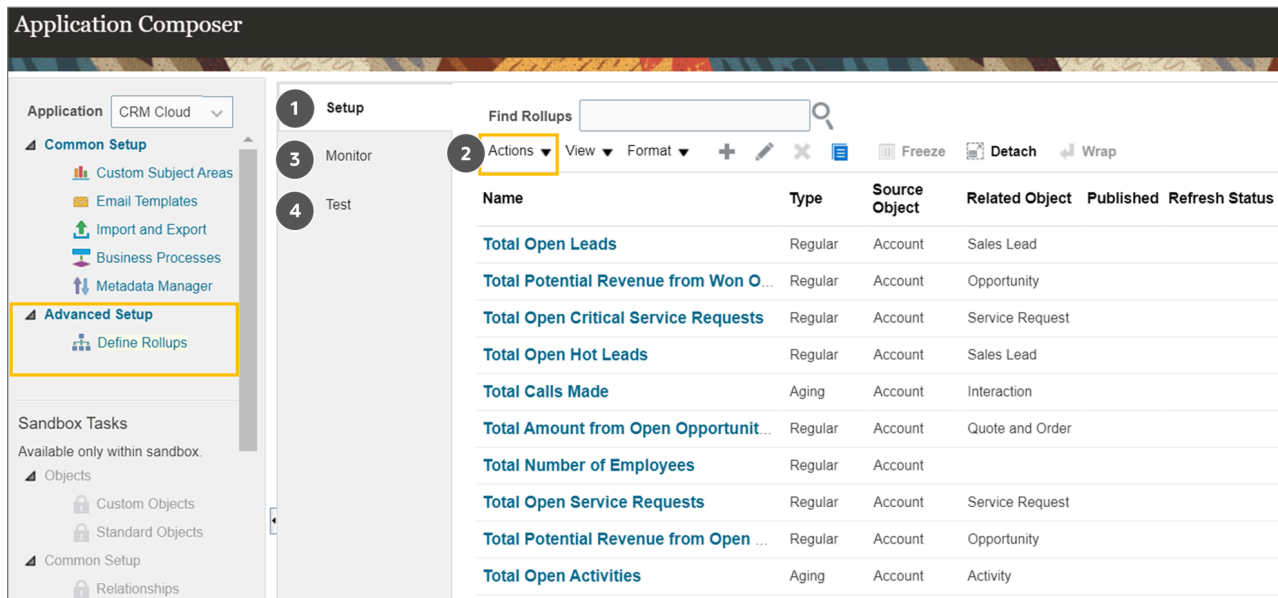
Step	Applies To	Description	Navigation	Where to Get the Details
		You can also show the rollups on the panels in Sales in Redwood UX.		- Add a Custom Field to the Edit Contact Page - Configure the Rollups Region in a Panel To access this guide, contact your Oracle representative.
7	Classic user experience	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 **Navigators > 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. 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.

Callout	Name	Description

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. To specify a different set of forecasting periods or 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.

Field	Explanation	Provided and Suggested Values
Forecast Frequency	Enter the number of submission windows you want to generate for each forecast period.	Because you're 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 next 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 later 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.
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 later periods.	The number of forecast periods is set to 4 (four quarters) for the whole year. You can change the number of forecast periods.

- If you changed the 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're 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're generated.

Note: For Sales in the Redwood UX, you select the **Forecast Period** and decide on the **Number of Active Periods** you want to forecast from the drop-down list. For example, from the **Forecast type** step in the Configure Sales Forecasting guided process, you can select a minimum of 1 period or a maximum of 5 periods. You can change the default value of 2 periods by using the `salesForecastParameters` REST service to set the forecast period to suit your specific requirements.

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 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.

- 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.

How can I display workflow notifications for Assignment Manager batch process jobs?

You can display object workflow notifications for assignment manager batch jobs to alert you of job completions for your specified assignment manager objects.

Change the Suppress Events for Assignment Processing in Batch Mode (ORA_MOW_ASGN_SUPPRESS_EDN_EVENTS) profile option value to N at both the site and product levels for your selected sales objects. This profile option applies only to email notifications that are sent as part of Assignment Manager workflow tasks. Bell notifications aren't affected. The current value is set to Y which hides all batch assignment process workflow notifications.

You can choose to turn on or off this profile option at the product level. For example, you might want to have workflow notifications for all Opportunity batch assignment jobs but want to hide all notification for batch Account assignment jobs. Note that the workflow notifications can't be suppressed if the assignment is processed using the Run Assignment option from the UI.

What do I need to know about changing recipient territories?

When you create a recipient territory, you use dimensional overrides to make changes to the proposed territory.

You can also make changes to recipient territories in a proposal at a later time. To end the inheritance relationship, change the source territory field to none.

Use Scheduled Processes to run the Update Inheritance Recipients process to update all recipient territories. This includes your changes and any inherited definitions from source territories. You can select a source territory to update, or leave that parameter blank to run all territories. The Maximum Number of Territories in Proposal parameter is set to 0 for best performance. This is important if you have a large number of territories or complex territory definitions. If you want to use proposals to update recipients, you can specify the maximum number of territories per proposal. The maximum you can enter is 500. This process can also be scheduled to run periodically.

What's the maximum number of opportunity revenue lines for one opportunity?

The maximum number of Opportunity revenue lines is 500.

How do I troubleshoot user access issues?

Troubleshoot data access issues for users using the access explorer.

On the Explore page, you can view all the access group rules and data security policies that affect a user's ability to view an object record and see whether or not each rule or policy has been granted to the user. You can use this information to find answers to questions such as these:

- What access policy do I have to grant to give the user access to a specific record?
- Which granted rule do I have to remove from the user so that the user can no longer access a record?

Note: The Explore UI shows the data access users receive through the Oracle CX roles they're assigned. It doesn't show users access to object records provided by non-CX roles, such as Oracle HCM roles, that they might also be provisioned with.

To discover why there are issues with a user's access to a specific object record, you need to know:

- The user name of the user.
- The name of the object.
- The Public Unique Identifier (PUID) of the record.

For information on how to find the PUID of a record, see the topic [Display Public Unique Identifiers for Object Records](#).

Note: Some objects don't support PUIDs. You can't investigate a user's access to a specific record for these objects.

Use these steps to review all the rules and policies that affect a user's access to a specific object record.

1. On the Sales and Service Access Management page, click **Explore Access**.
2. On the Explore page, select the name of a user in the **User Name** field.
3. Select an object in the **Object** field.
4. Enter the PUID of the relevant record in the **Public Unique Identifier** field.

The **Public Unique Identifier** field is unavailable if the object doesn't support public unique identifiers.

5. Click the **Explore** button.

By default, all the rules and data security policies defined for the object that grant access to the record are listed in the Access Groups table and the Data Security Policies table respectively. Review the information in the **Status** column of each table to see which of these rules and policies the user is granted.

Tip: You can display additional data for each rule or policy by selecting options from the **View** menu of each table.

6. Select the information you're interested in viewing in each table.

You can display different views of the user's access to the object record by changing the selections in the filters available for each table.

For example, if a user can't access the record, it might be because the user isn't granted access to the record, or because the user is granted access but the relevant rule or policy is inactive, or because the relevant data security policy is future dated. Select these filter options to figure out the cause of the issue.

Rules or Policies to View	Filter Options to Select
All the rules or policies that provide record access that the user isn't assigned	○ Not granted option from the Show Access list (Access Groups table) or the Show Conditions list (Data Security Policies table) ○ Yes option from the Provides Record Access list
All the inactive rules or policies assigned to the user that provide record access	○ Granted and inactive option from the Show Access list or the Show Conditions list ○ Yes option from the Provides Record Access list
All the future dated policies assigned to the user that provide record access	○ Granted and future dated option from the Show Conditions list ○ Yes option from the Provides Record Access list

7. In the Access Groups table, you can review the following information for each rule.

Field	Description
Status	This field can have one of these values: ○ Active. The rule is granted to the user, the rule is active, and the rule is enabled for an active access group. ○ Inactive. The rule is granted to the user but the rule is inactive, the access group the rule is associated with is inactive, or the rule to group association is disabled. ○ Not granted. The user isn't granted the rule.
Provides Record Access	This field indicates if a rule grants access to the record specified in the Public Unique Identifier field. A check mark indicates that the rule provides record access; if the field is empty, the rule doesn't provide access to the record. In the Access Groups table, this field can also be set to Not Applicable. This value is displayed for inactive custom rules. You must activate custom rules to see whether or not they provide record access.
Rule Name and Group Name	For rules that are granted to the user, these fields show the name of the rule and the name of the access group through which the user is assigned the rule. For rules that aren't granted to the user, only the rule name is shown.

Field	Description
	Tip: You can click the Rule Name or Group Name fields to drill down to the edit rule or edit group pages on the Access Groups UI if you have the Manage Group Access privilege (ZCA_MANAGE_GROUP_ACCESS_PRIV). This is useful if, for example, you want to investigate why a rule is inactive, or if you want to change the activation status of a rule. See the Access Groups chapter for information about editing access groups and rules.
Permissions	For rules that are granted to the user, you can review the type of access provided by the rule.

8. In the Data Security Policies table, you can review the following information for each policy.

Field	Description
Status	This field can have one of these values: ○ Active. The policy is active and is granted to the user. ○ Inactive. The policy is granted to the user but is inactive. ○ Future dated. The policy is granted to the user but the policy Start Date is set to a date in the future so the policy isn't yet active. ○ Not granted. The user isn't granted the policy.
Provides Record Access	This field indicates if a policy grants access to the record specified in the Public Unique Identifier field. A check mark indicates that the rule provides record access; if the field is empty, the rule doesn't provide access to the record.
Role	The name of the role or roles that provide the policy. The role name is displayed only for policies that are granted to the user.
Permissions	For policies that are granted to the user, you can review the type of access provided by the policy.

You can use the information from the **Status** and **Provides Record Access** fields to figure out what you have to do to provide a user with record access or to remove record access. But you can't edit data security policies on the Explore page.

For example, you might find that a policy that provides a sales manager with access to their subordinates opportunity records is future dated. In this case, note the name of the role providing the policy and edit the role on the Manage Data Policies page or on the Security Console to change the **Start Date** of the policy to the current date.

How do I run the processes that index the legacy CRM Search?

You must run two processes to enable work area searches for those work areas that use the legacy CRM search.

Note: This topic applies only to work areas that use the legacy CRM search. For Sales in the Redwood user experience and most work areas, including Workspace, you must set up Adaptive Search instead.

Process Name	Description	Recommended Interval
Synchronize CRM Search Indexes	Creates and maintains the search index. Oracle recommends that you set this process, which builds the search index, to run every five minutes.	Every five minutes
Optimize CRM Search Indexes	Optimizes the index. (The index can get fragmented over time.)	Weekly

These two processes automatically run at the recommended intervals when you use either of the following

- Setup Assistant

Setup Assistant runs these processes without any prompting from you.

- Schedule Work Area Search Processes page

This Quick Setup page is available in the Sales offering, Sales Foundation functional area. You run both processes by clicking **Submit**.

Here's how to run the processes at different intervals:

1. Click **Navigator > Tools > Scheduled Processes**.
2. On the Schedule Process window, click **Schedule New Process**.
3. In the Schedule New Process window, make sure the **Job** option is selected.
4. Enter the name of one of the processes in the **Name** field and click **OK**.
5. On the Process Details window, click **Advanced**.
6. On the **Schedule** tab, select the **Using a schedule** option.
7. Select a frequency.
8. Enter an end date in the far future.
9. Click **Submit**.

How do I monitor Adaptive Search background processes?

You must have the Application Implementation Consultant job role to enable and complete the Adaptive Search setup. Adaptive Search requires several background processes to run periodically. You can monitor these processes on the Monitor UI tab of the Configure Adaptive Search page.

For example, you can view the real-time progress of Adaptive Search indexing jobs. When you click **Publish**, a progress bar indicates how much of the indexing job has been processed and what percentage remains before completion. This feature provides visibility on the **Publish** job progress so that you can plan your operations and tasks.

Note: If you update the job request parameters after a job is submitted, then the results displayed on the progress bar might be unreliable.

You also receive email notifications about the status of Publish jobs for Adaptive Search if scheduled jobs haven't completed within a 12 hour time frame. For example, you get notified about the successful completion of published processes or you'll receive an alert of any failed processes that might be causing issues with access to data. Emails are sent to the user who submitted the last successful publish job, periodic job, or to the user who submitted the first successful publish job if the scheduler process data isn't already purged. You can also specify more email addresses when you schedule the publish job.

Note: If you want, you can reschedule all Adaptive Search jobs to be run by a different user. You just need to cancel the parent job for all the jobs and sign in with the new user details for the scheduler process jobs and reschedule them.

The Monitor UI tab includes subtabs where you can monitor the processes. The following table describes the processes, provides a recommended run schedule, and explains what actions you can take on each tab.

Note: Oracle recommends that you perform a full publish each time you do a production to test (P2T) environment refresh. When the full publish job completes successfully, your Adaptive Search configuration becomes the latest active meta model. This ensures that users have the latest features and enhancements and aren't limited in functionality due to an older version of an active meta model being in use. The recommended schedule for some processes might vary according to your business requirements, existing run assignments, and data load schedules.

Process and Tab Name	Process Description	Recommended Schedule	Available Actions
Periodic Refresh	Indexing enables Adaptive Search to find records based on keyword search terms entered, search filters, saved search criteria, and other search criteria. Periodic Refresh enables Adaptive Search to search for imported records and records that have gone through the mass update process. While records you create and update in the UI are automatically indexed	Every hour	- Change the process frequency by clicking Schedule Periodic Refresh. - Start the process immediately by clicking Start Process. Cancel Process cancels the instance of the process you selected.

Process and Tab Name	Process Description	Recommended Schedule	Available Actions
	and made searchable within seconds, imported records or records updated by background processes aren't available for search until the process completes. Note: The Publish process should be completed before running the Periodic Refresh process. When you run the periodic refresh, the application checks if the needed entities for the Redwood user experience has already been published.		
Publish	Publishes the Adaptive Search configuration you set up in the Quick Setup and Advanced Setup UIs. Note: For CLOB (Character Large Object) fields, only the first 4000 characters are indexed. New CLOB fields are no longer supported in Workspace. Note: Formula fields can't be configured. Also generated ID fields aren't available to enable for any objects in Adaptive Search. For example, you can't search on ID fields in Workspace such as Party ID, SR ID, Opportunity ID, Record ID for custom object, and so on. Such fields aren't searchable and can't be indexed by design.	You must click Publish to run the process each time you: - Make changes on the Setup tab. - Perform a production to test (P2T) environment refresh When you run the periodic refresh, the application checks if the needed entities for the Redwood user experience has already been published. If the Redwood entities haven't been published, then a Full Publish is submitted. Here are the different phases you can monitor from the progress bar: - Preparing for Indexing - Indexing in Progress - Updating References - Updating Latest Changes - Activating Indexes - Completed Your changes become effective when the process completes.	You can monitor the progress of the publish process. Your configuration is active when the process completes successfully. If the process fails to complete successfully, contact your help desk.
Maintenance	Backs up the current active meta model, removes older snapshots, and cleans up any search server index or snapshots that aren't associated with any workflow state of the meta model.	Daily	You can restore the current active Adaptive Search configuration by clicking Restore from Backup. This action clears any saved changes that aren't yet published.

Process and Tab Name	Process Description	Recommended Schedule	Available Actions
	Note: Restore from Backup is disabled if a meta model is being published.		To restore the last active Adaptive Search configuration version, click Revert to Previous Version. Any other actions should be taken by your help desk.
Territory and Resource Hierarchy Refresh	Updates the index with sales territory and resource hierarchy changes.	Weekly	- Change the process frequency by clicking Schedule Periodic Refresh. - Start the process immediately by clicking Start Process. Cancel Process cancels the instance of the process you selected.
Update Aggregates	Updates the index with total changes.	Weekly or as required.	- Change the process frequency by clicking Schedule Periodic Refresh. - Start the process immediately by clicking Start Process. Cancel Process cancels the instance of the process you selected.
Synchronize Access Rules Data	Updates access group object sharing rules.	Automatically runs when a job, Perform Object Sharing Rule Assignment Processing , or job set is submitted for a batch of access group object sharing rules for all the available assignment objects.	Depending on your requirements, you can change the process frequency by clicking Schedule Periodic Refresh . You can also manually Start or Cancel the process at any time.
Synchronize Lookup Values	You can run the Synchronize Lookup Values job to sync values for the Subscription object predefined lookup type fields with Adaptive Search indexes. The Subscription objects include Subscription, Subscription Product, and Subscription Covered Level. This scheduled process helps to keep Subscription data up to date in Adaptive Search so that searching and filtering can be performed based on the latest data.	Runs once a week by default. Note: If the schedule for the Synchronize Lookup Values job isn't already created, it will be automatically scheduled to run weekly after the Adaptive Search Publish job is run.	Depending on your requirements, you can change the process frequency by clicking Schedule Periodic Refresh . You can also manually Start or Cancel the process at any time.

Note: The Publish and Periodic Refresh indexing processes include records based on the following condition:
`LAST_UPDATE_DATE is greater than (CURRENT DATE - MAX_AGE_IN_DAYS) days.`

For example, in the case of opportunity records, this means that only those opportunities that were created and updated within the last 365 days are indexed and available for viewing in Workspace. To view records older than 365 days for your specific object, you need to update the MAX_AGE_IN_DAYS entity to a greater number than 365.

How To Change Periodic Refresh Frequency

The default periodic refresh process runs every hour. However, you might want to change the frequency to run every 15 minutes so that any new records quickly appear in your Workspace saved searches.

Here's how to change the periodic refresh frequency.

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to:
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o Task: Configure Adaptive Search
3. From the **Configure Adaptive Search** page, click **Monitor > Periodic refresh**.
4. Select the job row which is currently running hourly and has a status of **Wait**.
5. Click **Schedule Periodic Refresh**.
6. Click **Change Frequency** and adjust the schedule to run every 15 minutes or per your specific requirement.

Adaptive Search Meta Model Types

Adaptive search saves the published configuration so you can restore the behavior you had before. Or you can restore to the seeded one. Meta models encode the information that's necessary to index the entities that are searched. Adaptive Search supports the following meta models, each with a distinct workflow state.

- Seeded Meta Model

A ready to use model that's shipped to customers. You can click **Restore Defaults** to revert to the predefined meta model.
- Sandbox Meta Model

A modified version of the Adaptive Search configuration is stored and saved when you change the configuration and click **Save** or **Save and Close**.
- Being Published Meta Model

When the configuration changes are saved and you click **Publish**, the meta model is in a state of being published.
- Active Meta Model

When the full publish job completes successfully, it becomes the active meta model.
- Archived Meta Model

The previous successful version of the configuration becomes the archived meta model. There's only one archived version available.

Index Date Ranges for Adaptive Search Objects

Adaptive Search objects are categorized into transactional objects and reference objects. Transactional objects store Sales and Fusion Service transactions while reference objects don't. The following sections outline how the search records for both types of objects are indexed.

Transactional Objects

When indexing transactional object search records for the first time, Adaptive Search only index records that have the "Last Updated Date" within the last 365 days. Thereafter, records that are changed or created from transactional objects are incrementally added to the index. Here's a list of the Adaptive Search transactional objects:

- Activities
- Campaigns
- Case
- Deal Registration
- HR Help Desk Request
- Internal Service Request
- Leads
- Opportunities
- Quotes and Orders
- Quote and Order Lines
- Revenue Lines
- Service Requests
- Work Order

Note: Adaptive Search transactional object details are updated asynchronously during Near Real-time Indexing. The asynchronous update happens after the objects in the above list are refreshed.

See the following transactional object examples of what content is indexed for a specific action on a particular date for Opportunity records:

Date	Action	Index Content
Dec 15, 2018	Publish job is run	Records, which have Last Updated Date > Dec 15, 2017
Jan 10, 2019	New Opportunity created with name Green Servers	All previously indexed records plus the new opportunity record (Green Servers) created
Jan 20, 2019	20 new opportunities created by an import job	All previously indexed records plus the 20 new records created (after the periodic refresh job completes)

Reference Objects

All records from the reference objects are indexed. Custom objects are treated as reference objects and hence all their records are indexed. Here's a list of the Adaptive Search Reference objects:

- All custom objects
- Account

- Asset
- Contact
- Installed Base Asset
- Partner
- Partner Contact
- Product
- Product Group
- Territory

How can I defer replicating records during reindexing?

You can configure how Adaptive Search indexes custom search records using the Advanced subtab from the Parameters tab available in the Adaptive Search setup page. For example, for custom objects, you might want to defer re-indexing of previously created records when running a partial publish indexing process.

Note: You must have the ZCA_ADAPTIVE_SEARCH_EDIT_PARAMS_PRIV privilege to view and access the **Advanced** parameters of Adaptive Search. Once you are assigned this privilege, you can also view other parameters such as

You can choose to change current and default advanced parameter values if you have the required privilege. Here's how to edit the **Defer Replica Creation During Reindexing** Adaptive Search parameters for your custom business object.

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to:
 - Offering: Sales
 - Functional Area: Sales Foundation
 - Task: Configure Adaptive Search
3. On the **Configure Adaptive Search** page, click the **Parameters > Advanced** tab.
4. Highlight the **Defer Replica Creation During Reindexing** that you want to change and click **Edit**. This warning is displayed.

You're about to change parameters that control how Adaptive Search works. Changes should only be carried out by search setup experts. Do you want to continue?

5. Click **Yes**.
6. In the **Current Value** field, change the value from No (default value) to Yes and click **Save and Close**.

The next time you perform a partial publish, only a reindexing of the custom object occurs and takes less time to complete.

What are opportunities?

Opportunities allow organizations to support the full sales process, from leads, to opportunities, to sales. Within opportunities, you can capture information related to an opportunity, such as customer (account) and the products to be sold.

Guided by the sales method tailored to each sales situation, the opportunity sales team works to close the deal. Your sales organization can create different sales methods for different sales situations. Each sales method can take salespeople through different sales stages and steps.

In addition, administrators can specify a different default win probability percentage for each sales stage. The sales team closes the opportunity when the deal is won or lost. If you lose the deal, the sales organization might require you to enter competitors and the reasons why the deal was lost.

Here are just some data that sales teams can capture for an opportunity:

- **Accounts:** You can associate an account (for example, a customer or prospect) with an opportunity.
- **Opportunity owner:** The person who creates an opportunity is automatically assigned ownership. You can change owner if needed.
- **Contacts:** You can associate contacts with an opportunity. In addition, you can specify a contact's role, affinity, and influence level on an opportunity. A single contact can be marked as primary.
- **Currency:** The application supports multiple currencies at both the opportunity header and revenue-line levels.
- **Budget:** Indicates whether the opportunity revenue amount has been budgeted by the customer, and the date that the budget was made available.
- **Revenue:** You can add products or product groups and amounts to an opportunity, if your administrator has enabled the sales catalog.
- **Competitors and partners:** You can associate partners and competitors with opportunities.

When salespeople access opportunities, they can quickly view the sales pipeline at a glance from the UI. They can also view Deal Registrations associated with their opportunities by simply entering the smart action **Show Deal Registrations** from the **Action Bar** from the Opportunity page.

See the Overview of Opportunity Sales Methods and Stages topic in the Implementation Reference guide for information about sales methods and stages.

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.

How can I act on multiple records at the same time?

You can take actions on multiple records at the same time on any of the list pages of your Sales application. What actions you can take depends on the records you select and the permissions you have. For example, select a group of sales leads from the list, and you might be able to qualify them, convert them, or delete them all.

Note: If some leads you selected are already converted, however, the convert action won't be available.

If you don't have delete permission, you won't be able to mass delete the leads. You can make mass updates in the list pages in different interfaces, including Oracle Sales in the Redwood User Experience, the classic Oracle Sales, and in Workspace.

In the classic Sales, you select the records, right-click and select the action you want to take from the menu. For Sales in the Redwood UX, you select the records and click either the **Update** or the **Actions** button.

Note: By default, Sales in the Redwood UX list pages have only a limited number of mass actions available. For example, only the **Qualify** mass action is available for leads. Your sales administrator must enable other actions in the Smart Actions work area of Application Composer. The smart action must include the following values:

- Mass Action: On
- Application: Sales
- UI Availability: List page

Related Topics

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

How do I use dynamic and nested dynamic tabs?

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

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

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

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

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

Work with Dynamic Tabs and Nested Dynamic Tabs

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

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

The nested dynamic tabs contain these buttons:

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

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

Note: If you choose to use dynamic tabs, then record-level navigation won't be possible. That means that the Previous and Next buttons on the record details page won't be available for navigating lists of records for Account, Contact, Lead, Opportunity, Activity, Campaign, Territory, and custom objects through the Workspace UI.

Why can't users edit contacts even when they're the owner?

The users might not be synced with the Oracle Applications security database tables. Here's how to fix the issue:

1. Run these scheduled processes:
 - Synchronize User GUID. This process resolves invalid and missing user global unique identifiers by synchronizing them.
 - Import User and Role Application Security Data. This process imports user and role data from LDAP and stores it in the Oracle Applications security tables.
2. Next, navigate to **Tools > Sales and Service Access Management**.
3. Navigate to **Object Sharing** and select the **Contact** object from the drop-down list.
4. For the access group that the users are in, set **Access Level** to Full.
5. In the Object Sharing Rules page, select **Actions** and publish the access group rules.
6. Navigate to the **Monitor** tab and run the scheduled process, Perform Object Sharing Rule Assignment Processing.

How can I improve the performance of my sales team?

Sales managers can improve the sales performance of their directs by creating contests and by setting team goals to promote and drive sales performance using the **Sales Performance** dashboard from Oracle Sales in the Redwood User Experience.

Oracle Sales teams can use contest leader boards to help create a healthy competitive spirit among members of their sales organization. They can create goals to ensure the team focuses on key performance indicators. Salespeople

can then track their individual progress and take actions to ensure they meet their targets. Sales managers can view, compare, and benchmark individual performances to help coach and motivate the sales activity of the team.

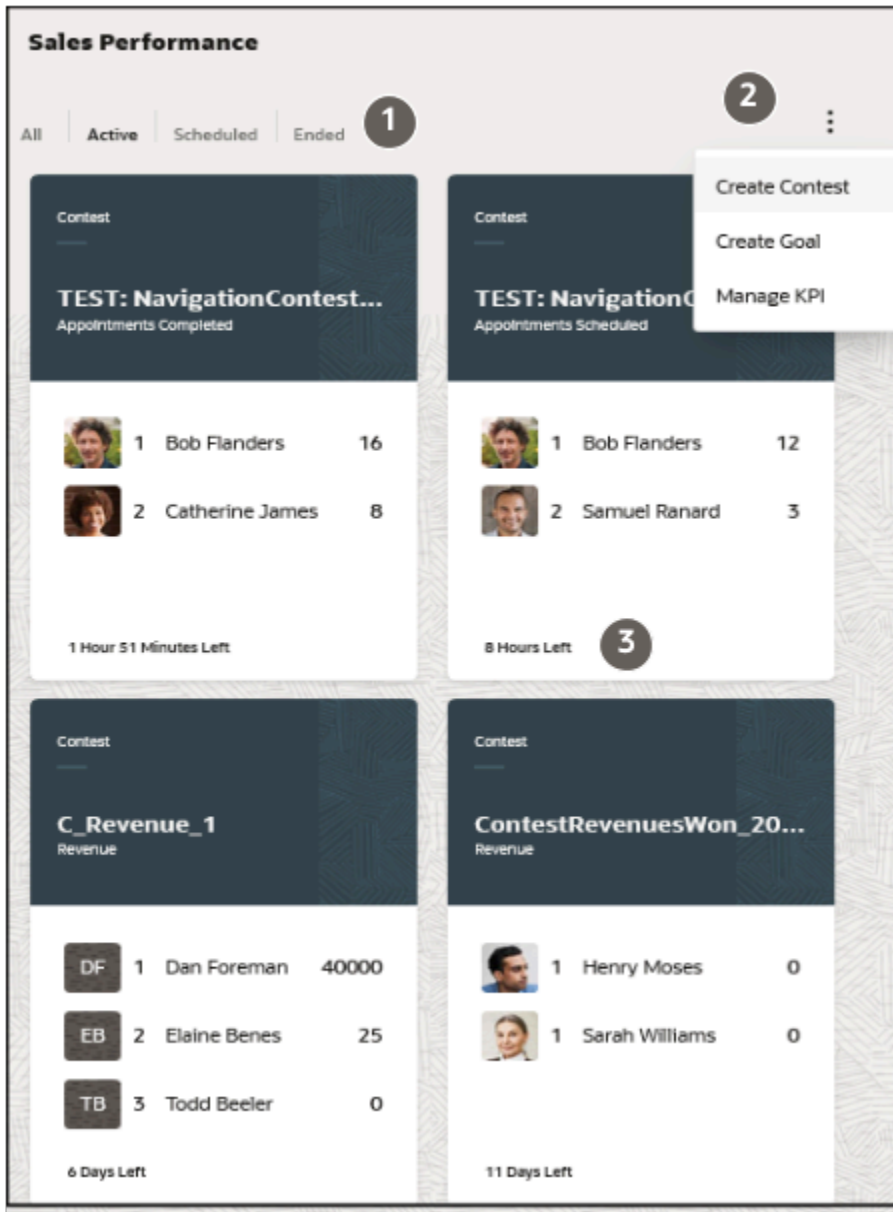
For example, to boost sales of a product recently released into the market, a sales manager creates a contest. The contest is for a defined period of time and is aimed at increasing the number of calls the sales team makes to potential customers. Participants, in competition mode, try to maximize the number of customer calls they make.

The sales team uses the Performance dashboard to monitor the contest time remaining, and their scores and targets, along with some statistical data. Let's say one of your sales representatives has 15 hours remaining in the contest and currently ranks third on the contest with five calls made. They can compare their score with the first-ranked participant (who has made eight calls so far) and try to better it in the remaining time. By monitoring the Performance dashboard, users can monitor the time remaining, their score and target, along with some statistical data.

You can activate and deactivate predefined key performance indicators (KPIs) or view, create, edit and delete custom KPIs to use in contests and goals. The Performance dashboard displays all performance-related cards for contest and goals where the user is a participant or is the owner. The management hierarchy of each participant can also see the contests and goals. Sales managers can view their team's goal card and their own individual goal card. Sales representatives can view their own goal cards from the Performance page.

For example, you can click one of the following four tabs (see callout 1):

- All: Displays all active, scheduled, and ended contests and goals
- Active: Displays only contests and goals that are currently active
- Scheduled: Displays contests and goals that are scheduled but aren't active yet
- Ended: Displays all contests and goals that have ended and are no longer active



As a sales manager, you can perform these tasks from the dashboard (see callout 2):

- Create Contest

Create a contest to help create a healthy competitive spirit among members of their sales organization and monitor a contest in progress.

- Create Goal

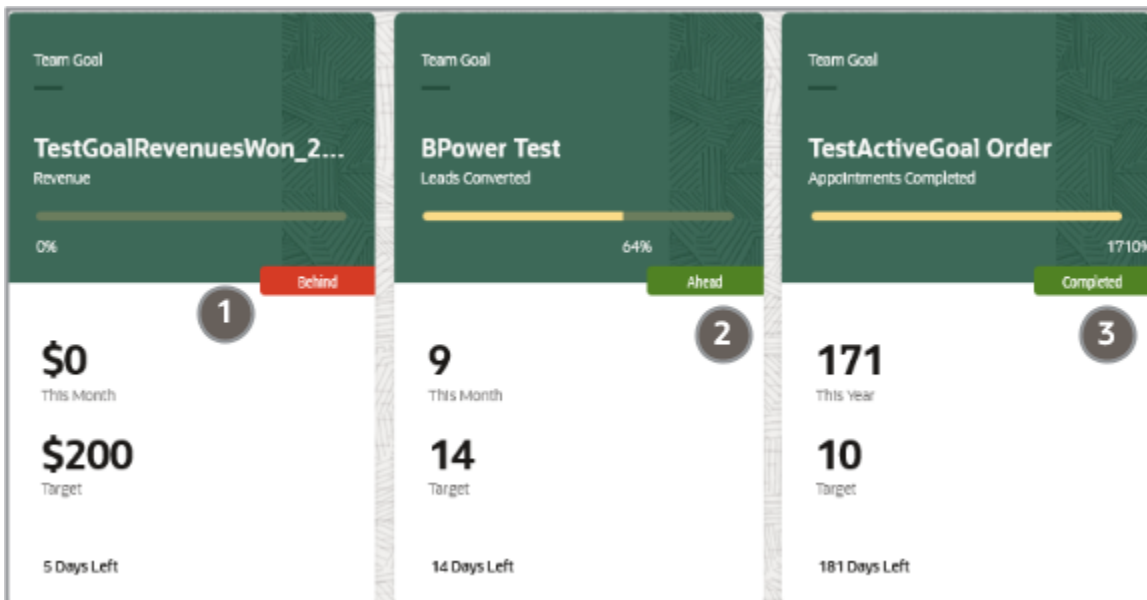
Create and manage goals to ensure the team focuses on key performance indicators and review and monitor the progress of each individual.

- Manage KPI

Manage your KPIs to support predefined and custom key performance indicator definitions and goals to generate contests among goal participants.

You can see at a glance the time remaining for the contest or goal and the overall progress status (callout 3). You can also view details of all goals, including team goals, and view a brief synopsis of how participants are performing against their targets. In a Team Goal card, the values are calculated as the sum of KPI values achieved by all team members including the manager and the following labels indicate the team's progress for the goal:

- Ahead (callout 2)
- Behind (callout 1)
- Completed (callout 3)
- On Track
- Ended which means a goal period has ended without the goal target being completed.



How do I create sales restricted users?

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

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

Use these steps to create a sales restricted user.

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

For information about this task, see the topic, [How do I create application users?](#).

2. When creating the user, specify these values.

Field	Value
Person Type	Employee
Resource Role	Sales Restricted User

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

The user is automatically assigned the following roles:

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

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

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.

What's the lead-to-opportunity attribute mapping?

The lead-to-opportunity attribute mapping is a predefined one-to-one mapping of the attributes between the lead and opportunity applications. When converting leads to opportunities, lead attributes, such as sales account, products, revenue amount, lead contacts, and other attributes, are mapped to the newly created opportunity.

You convert a lead to an opportunity when the lead is qualified and is ready for further processing along the sales cycle. The following sections outline:

- General lead attributes mapped to opportunities
- Partner lead-specific attributes mapped to opportunities
- Lead contact attributes mapped to opportunity contact attributes
- Lead product attributes mapped to opportunity revenue line attributes
- Profile options that specify the mapping file name for user-defined mapping files

General Lead Attributes Mapped to Opportunities

This table lists the general lead attributes that are mapped to the corresponding opportunity attributes:

General Lead Attribute	Opportunity Attribute
Budget Amount	Budget Amount
Budget Status	Budget check box
Customer	Target Party
Currency	Currency
Description	Description
Estimated Close Date	Estimated Close Date
Expiration Date	Expiration Date
Lead Number	Lead Number
Name This attribute value is the Lead Name and the current date and time, which generates a unique opportunity name.	Name
Owner	Owner of opportunity

General Lead Attribute	Opportunity Attribute
Indicates the user who starts the conversion.	
Primary Contact	Key Contact
Source Code If a campaign or any other source creates a lead in which source code is used, then this attribute value is mapped.	Source

Partner Lead Attributes Mapped to Opportunities

This table lists the partner lead attributes that are mapped to the corresponding opportunity attributes:

Partner Lead Attribute	Opportunity Attribute
Deal Approved By For direct leads, this attribute is set to the user who starts the conversion.	Owner of opportunity
Deal Approved By Resource Organization	Resource Organization
Partner	Partner
Partner Type	Partner Type
Partner Program	Partner Program
Registration Type	Registration Type
Registration Number	Registration Number

Lead Contact Attributes Mapped to Opportunity Contact Attributes

To map lead contact attributes to opportunity contact attributes, the following relationships must apply between the contact and the customer:

- The relationship end date is later than the current date.
- The relationship start date is earlier than the current date.
- The relationship status is active.

This table lists the lead contacts attributes that are mapped to the corresponding opportunity contacts attributes:

Lead Contact Attribute	Opportunity Contact Attribute
Contact	Contact
Contact Role	Contact Role
Primary	Primary

Lead Product Attributes Mapped to Opportunity Revenue Line Attributes

This table lists the lead product attributes that are mapped to the corresponding opportunity revenue line attributes:

Lead Product Attribute	Opportunity Revenue Line Attribute
Amount	Revenue Amount
Approver	Resource Party
Currency	Currency for the Revenue Amount
Inventory Item	Inventory Item
Organization	Inventory Organization
Product Group	Product Group
Quantity	Quantity
Unit of Measure	Unit of Measure
Unit Price	Unit Price

Profile Options for Mapping File Names

As an administrator, you can specify your own mapping file name to use for mapping objects and attributes during the lead-to-opportunity conversion process. For example, you can create user-defined lead attributes in **Application Composer**, **Copy Maps**, and can then add these attributes to the existing ready-to-use mapping files. You must save the user-defined mapping file using a unique file name and then specify the saved mapping file name in one of these profile options:

- Use the **Direct Lead to Opportunity Mapping** profile option to specify the mapping file name created when a direct lead is converted to an opportunity.

- Use the **Partner Lead to Opportunity Mapping** profile option to specify the mapping file name created when a partner lead is converted to an opportunity.

How can I define the automatic assignment of Lead team resources?

Using a scheduled process, you can automatically assign lead team members and appropriate sales territories to leads. The scheduled process accepts criteria to determine the batch of leads to be assigned.

During the rule-based assignment phase of the batch process, matching candidates are automatically added to the lead team. During the territory-based assignment phase of the batch process, territories are automatically added to the lead territory team.

This example outlines how to set up lead assignment tasks and to schedule the tasks in sequence so that you can automate the lead resource assignment process.

Scenario

The automotive sector uses geography data and overall lead quality to periodically assign leads to automotive dealers. You can assign leads automatically by using score and rank criteria before being assigned a resource. Leads are automatically assigned through the assignment manager feature by associating assignment criteria to assignment rules. For example, leads are assigned based on the following criteria:

- Lead source
- Geography
- Lead score
- Named accounts, such as the top 20
- Industry
- Products

When partners must engage with customers to ensure a timely sales follow up, set up assignment manager to automatically assign partner leads to internal channel managers.

Manual Setup Assignment Manager Tasks

You can perform manual setup tasks through the assignment manager UI as follows:

- Define lead distribution rules
- Define partner matching rules
- Define the quality parameters to assign leads for follow-up activities
- Set up lead qualification rules
- Set up lead classification rules to assign leads to specific sales channels
- Set up lead routing rules to route leads to sales resources in a selected sales channel
- Set up lead distribution rules to assign leads to a specific salesperson or a partner sales territory

Use rule sets if you're assigning leads by rule-based assignment. If the lead requires territory-based assignment only, then rule sets aren't used. During a lead import, either ranking or scoring is used as the default qualification criteria. However, if scoring is used to determine the lead rank, then both lead score and lead rank can be used as criteria for assigning lead resources.

Automatic Assignment Manager Tasks in Batch Mode

To automate assigning lead resources, schedule and sequence these tasks to occur in this order when assignment manager runs in batch mode:

- Assign leads to a sales channel
- Route leads to sales organizations and sales territories
- Assign leads to individual salespeople or partners

You can also manually assign leads to specific internal or external resources. You can make these selections:

- Job type
- Rule set
- Filtering criteria for selecting lead

Related Topics

- [How can I assure that the assigned lead owner remains the owner when the lead is converted?](#)
- [What types of assignment rules can I create?](#)

What types of assignment rules can I create?

Assignment rules are created using rule sets, rules, conditions, and actions. The assignment process uses your rules to evaluate and recommend candidate assignments for specified work objects. This topic provides scenarios to illustrate the different types of rules you can create.

Note: When creating an assignment rule that uses a checkbox field, note that the value of true might be denoted by "Y" or "Yes" or "T". Ensure the checkbox is clear to denote a false value.

Create Lead Qualification Rules

In this scenario, you want to create rules to classify leads as qualified if these attributes are set as specified:

- Lead Customer is sales account.
- Lead Product is set to Is Not Blank.
- Lead Score is greater than 150.

To create a rule to classify leads as qualified:

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

- Offering: Sales
 - Functional Area: Leads
 - Task: Manage Sales Lead Assignment Rules
2. Search for and navigate to the assignment configuration setup task for the relevant object:
 - For sales lead and deal assignment, go to the Manage Sales Lead Assignment Rules task. This is the task used as an example in this topic.
 - For the Opportunity functional area assignment, select the Manage Opportunity Assignment Manager Rules task.
 3. In the setup task page, select the category for the appropriate assignment flow, in this case **Sales Lead Qualification Rule Category**.
 4. Click the **Add Row** icon to create a rule set for the predefined rule category Sales Lead Qualification Rule Category.
 5. Create a rule with the three conditions that match the attribute settings for a lead to be considered a qualified lead:
 - Lead Product: Select the lead attribute **Primary Product ID**. Select the **Is Not Blank** operator.
 - Lead Customer: Select the lead attribute **Sales Account Indicator**, and then select the **Equals** operator. Enter the value of **x**.
 - Lead Score: Select the lead attribute **Score**, and then select the **Greater Than** operator. Enter the value of **150**.
 6. In the Actions region, select **Qualified** from the **Return the Candidate Value As Qualified** list.

Create Lead Scoring Rules

In this scenario, you want to create a scoring rule to:

- Increase lead scores by 150 if the lead attribute Lead Time Frame is set to 3 months.
- Increase lead scores by 100 if these attributes for leads are set as specified:
 - Budget Status is Approved
 - Budget Amount is greater than 500000

To create this scoring rule:

1. Create a rule set for the predefined rule category Sales Lead Scoring Rule Category.
2. Create the first rule with the conditions that match the attribute settings you want a lead to have so that 150 is added to its score:
 - Choose the object **Sales Lead** and attribute **Time Frame**, and then select the **Equals** operator. Select **3 months**.
 - Enter the action as **Increase the Score by 150**.
3. Similarly, create your remaining rule for the budget attributes and action to **Increase the Score by 100**.
 - a. Add the first condition: Choose the object **Sales Lead** and attribute **Budget Status**, and then select the **Equals** operator. Select **Approved**.
 - b. Add the second condition: Choose the object **Sales Lead** and attribute **Budget Amount**, and then select the **Greater Than** operator. Enter 500000.
 - c. Enter the action as **Increase the Score by 100**.

Create Matching Candidate with Scoring Rules

Assign different country specialists to opportunities in some European countries based on the country and the risk level of the Opportunity. To create matching candidate with scoring rules:

1. Create a rule set for the predefined category Sales Lead Resource Rule Category and select the **Use Score** option, the filter type of **All Above Minimum Score**, and the minimum score set to **20**.
2. Create three rules each with conditions:
 - a. Create the first rule with these conditions:
 - Select the object **Opportunity**, and then choose the attribute **Customer Country**. Select the **Equals** operator, and then select **DE**.
 - In the rule action, set **Increase Score By** to **20**.
 - Select and add the appropriate resource.
 - b. Create the second rule with these conditions:
 - Select the object as **Opportunity**, and then choose the attribute name **Customer Country**. Select the **In operator**, and then select **FR** and **UK** as condition values.
 - In the rule action, set **Increase Score By** to **20**.
 - Select and add the appropriate resource.
 - c. Create the third rule with these conditions:
 - Select the object **Opportunity**, choose the attribute name **Risk Level**. Select the **Equals** operator, and then select the value **High**.
 - In the rule action, set **Increase Score By** to **20**.
 - Select and add the appropriate resource.

Related Topics

- [How do I update existing setup data?](#)

Can I sort opportunity searches by the last update date?

Yes, you can sort the records returned from your opportunity search by last updated date in descending order. Request your administrator to change the Opportunity List Sort profile option from N to Y. You can then quickly review and action recently updated opportunities.

How do I switch to Work Areas powered by Adaptive Search

Here's how existing customers can switch from the legacy work areas to the new work areas powered by Adaptive Search. No action is required for new customers who get the new work areas by default.

You must complete these steps:

- Use the Opt In UI to enable this feature.
- Make sure that the business objects for the work areas are indexed.
- You select the **Display Object in Workspace** checkbox on the Configure UI tab in the Configure Adaptive Search page.

See the Configure UI section of *What are the Adaptive Search setup UI components?* topic for more information.

Note: Salespeople granted the View Fuse List as Default List Pages (ZCA_VIEW_FUSE_LIST_PAGES) privilege, are taken to the legacy work areas that use CRM Search technology instead of the new ones.

Opt in to Enable Work Areas Powered by Adaptive Search

Here's how existing customers can enable navigation to the new work areas that use Adaptive Search.

1. Sign in as a setup user.
2. In the Setup and Maintenance area, go to the Sales offering.
3. Select the **Change Feature Opt In** from the **Sales Foundation** functional area and open the **Edit Features: Sales Foundation** page.
4. In the Features column, locate **Open Work Areas Powered by Adaptive Search**.
5. Click the pencil icon and select the **Enable** check box.
6. Click **Done**.

For more information, see the New Feature Opt-In section of the Oracle Applications Cloud - Using Functional Setup Manager guide on the Oracle Help Center (docs.oracle.com).

How can I sort my opportunity list by last updated date?

You can sort the records returned from your opportunity search by setting the Opportunity List Sort profile option.

Sort Opportunity Searches by Last Updated Date

By default, records on the Opportunities overview page are sorted by win probability and opportunity name. However, if you set the Opportunity List Sort (MOO_LIST_DEFAULT_SORT) profile option to Y, then the opportunities are sorted by last updated date in descending order. This enables sales representatives to quickly review and act upon recently updated opportunities.

Set the Profile Option

Here's how to set the Opportunity List Sort profile option:

1. In the Setup and Maintenance work area, go to:
 - Offering: Sales
 - Functional Area: Opportunities
 - Task: Manage Opportunity Profile Options

2. In the search region of the Manage Opportunity Profile Options page, enter Opportunity List Sort in the **Profile Display Name** field.
3. Click **Search**.
4. In the Profile Values section, select Y from the **Profile Value** drop-down list.
5. Click **Save**.

Related Topics

- [How do I update existing setup data?](#)

How do I access Workspace data offline?

You can export data from Workspace for offline viewing and verification. For example, a sales manager might want to export a list of accounts to perform a more in-depth analysis of their sales team or for reporting purposes.

Only sales manager and sales administrator roles are granted the predefined security privilege ZCA_WORKSPACE_EXPORT to access the export data feature in Workspace.

The **Export List** button enables you download data from Workspace as a comma-separated values file. You can then use this file to view or analyze your data offline.

Click **Export List** to download all data in the result set. The result set is determined by the columns displayed in the Workspace UI. Export doesn't include data for hidden columns. It includes all the rows filtered by the current filter criteria applied.

The default number of rows to export is 2000 and the maximum limit is set at 10000 rows. You can change the default number of rows by changing the **Maximum Number of Records for Export** parameter from the Parameters tab on the Configure Adaptive Search page. See the related topic Edit Adaptive Search Parameters for more information.

When the maximum limit of rows to export is reached, a warning message is displayed prompting you to click **Continue** to export the first 2000 rows in the result. This action generates a file containing the first 2000 rows of the result set. If you don't want to export the result set, click **Cancel** to return to the Workspace UI.

The exported file contains the results set data displayed in the same column headers and in the same order as displayed in Workspace.

Note: You can also export personally identifiable information (PII) if you have the required access to view PII attributes in Workspace.

Related Topics

- [How do I edit Adaptive Search parameters?](#)

What are the Adaptive Search setup UI components?

Here's a quick rundown of the Configure Adaptive Search page.

The Configure Adaptive Search page is made up of five tabs:

- Monitor
- Setup
- Parameters
- Configure UI
- Configure Global Search

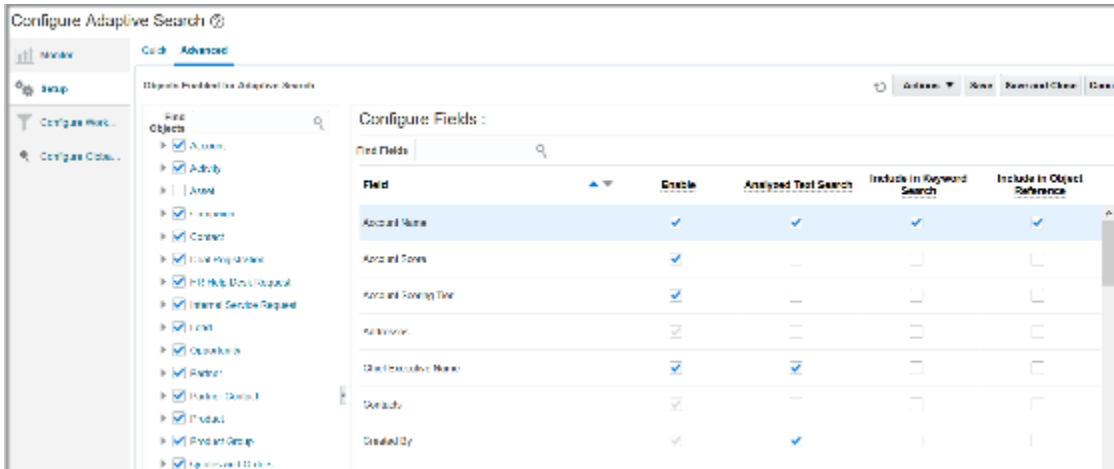
Setup

The setup tab includes the **Quick** and **Advanced** subtabs. Use the **Quick** subtab to get an overview of the predefined and custom objects are available for Adaptive Search. If you're OK with using the search configuration provided by Oracle, you can select the objects you want to enable and click **Publish**.

On the **Advanced** subtab, you can change which objects and fields are enabled for search, how they're searched on, and other search configurations. You can also enable and disable objects for searching. Click Publish to save these changes. Once the publish job is complete, any user with permission to access an enabled object can search on fields enabled within the object, retrieve search results, create saved searches, and more.

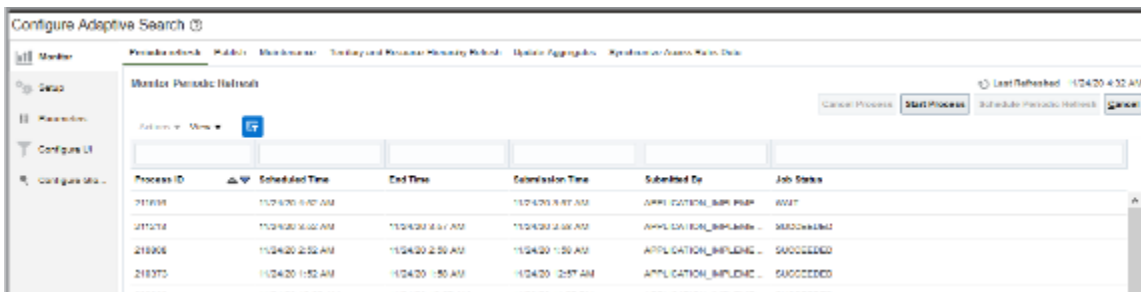
The left side of the **Advanced** subtab shows the ready-to-use objects, including any custom objects or child objects you created in Application Composer. The right portion lists the fields, including any custom fields you created. You can also view field names and their types and can enable up to 15 fields for use in searches of related objects in the **Include in Object Reference** column. You must publish your changes before they take effect. See the Search Setup section of this chapter for details.

Note: To enable search on custom fields and custom child objects, you must first publish them from the sandbox. You can't use the Configure Adaptive Search UI within a sandbox.



Monitor

You can monitor the publish process as well as other indexing and maintenance processes on the **Monitor** tab. From here, you can view the real-time progress of Adaptive Search indexing jobs. When you click **Publish**, a progress bar indicates how much of the indexing job has been processed and what percentage remains to complete the indexing process. See the [Monitor Adaptive Search Background Processes](#) topic for more details.



Parameters

You can configure various parameters to specify how Adaptive Search behaves, using the **Parameters** tab available in the Adaptive Search setup page. For example, you can enable mass update and actions, set record-level navigation, specify the fuzziness level for search, and so on. See the [How do I edit Adaptive Search parameters?](#) topic for details.

Configure Adaptive Search ?

Monitor
Setup
Parameters
Configure UI
Configure Globa...

Parameters

Edit Adaptive Search Parameters Edit Cancel

Parameter Name	Minimum Value	Maximum Value	Default Value	Current Value
Decouple incremental job at the end of Publish	-	-	N	N
Enable Group By in Workspace	-	-	N	Y
Enable Keyword Highlighting in Workspace	-	-	Y	Y
Enable Mass Actions	-	-	Y	Y
Enable Mass Update	-	-	N	Y
Enable record level navigation	-	-	Y	Y
Fuzziness Level	None	Two	One	One
Lookup Type Cache Concurrency Level	1	10	2	2
Lookup Type Cache Initial Capacity	16	10000	16	16
Lookup Type Cache Load Factor	0.5	1.0	0.75	0.75
Maximum Number of Records for Export	1	10000	2000	2000
Maximum number of records that can be selected in Workspace	1	25	10	10
Enable Partial Publish	-	-	Y	Y
Search Filter Limit	1	10	6	6
Shard maximum size required for index in GB	1	9999	45	45

Configure UI

You can use the **Configure UI** tab to specify which fields are available for selection as filters and for display as columns in search results. You can also set up filter value groupings or value ranges for date and numeric fields. Users can select these value groupings to filter search results. See [Enable Fields for Display as Filters and Search Result Columns](#) for details.

If you have the mass update parameter selected from the **Parameters** tab on the **Configure Adaptive Search** page, then you can specify which fields to enable for mass update by selecting the **Enable for Mass Update** checkbox. When editing UI columns and specifying fields, always ensure that you have at least four fields selected for both standard and custom objects.

Note: If the parent (controlling) attribute isn't enabled in Adaptive Search, the child (controlled) attribute can't be enabled for mass update. For example, let's say the controlling attribute of **Sales Method** is **Opportunity Type**. If Opportunity Type isn't enabled in Adaptive Search, then Sales Method won't be available to be enabled for mass update.

From the **Configure UI** tab, you can also add or remove Create, Export, and Mass Update buttons for every object using the following options:

- **Create**
- **Export**
- **Mass Update**

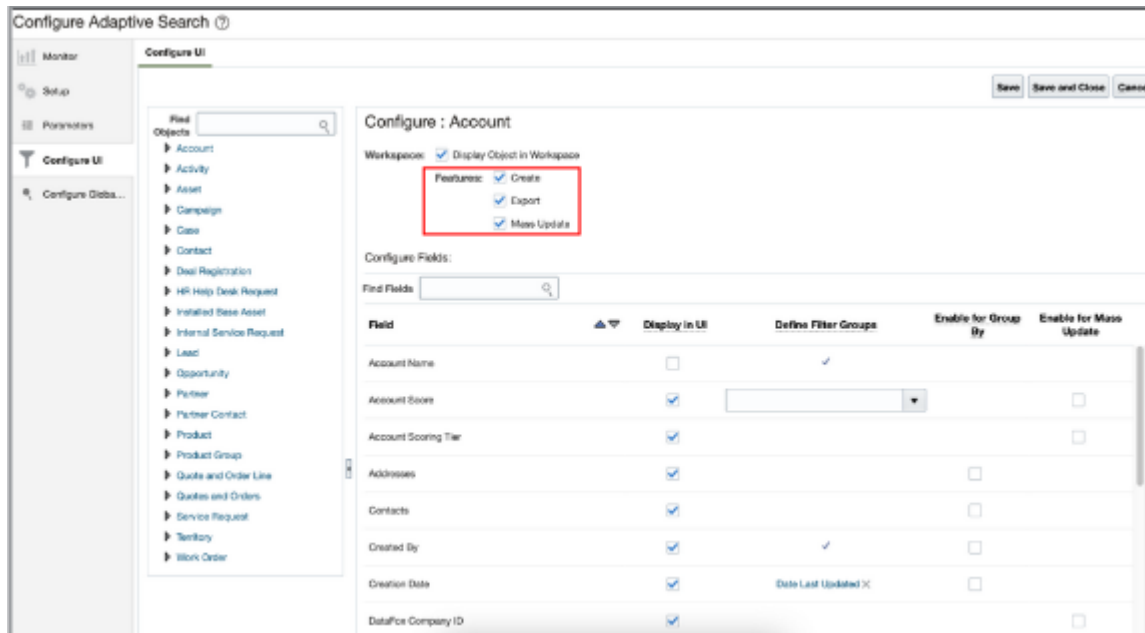
For example, follow these steps if you want to restrict the export option in Workspace based on the Account object.

1. Sign in as a setup user.

2. Navigate to the Setup and Maintenance work area, and click the **Configure Adaptive Search** task:
 - Offering: Sales
 - Functional Area: Sales Foundation
 - Task: Configure Adaptive Search

The Configure Adaptive Search page appears.

3. Click **Configure UI**.
4. Select Account in the left pane of the tab as the object you want to restrict the export option in Workspace.
5. Deselect the **Export** option in the **Features** section as highlighted in this sample screenshot.



6. Click **Save and Close**.

You can verify your changes as follows:

1. Sign out and Sign in again as a salesperson user.
2. Navigate to **Workspace > My Accounts Saved Search**
3. Verify that the **Export List** button isn't displaying in the Account Workspace List Page.

See [How do I access Workspace data offline?](#) for more information.

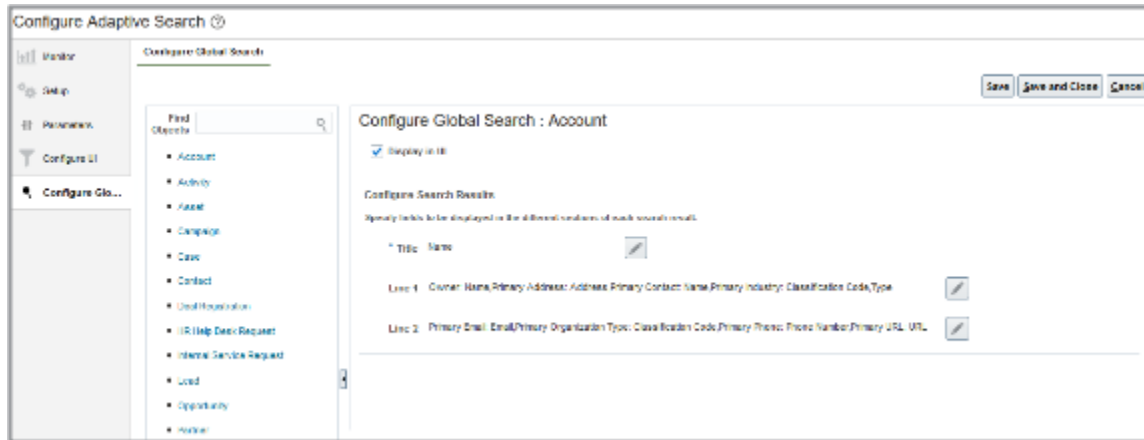
Configure Global Search

Global search enables you to search for any object to which you have access across Sales and Fusion Services. Searches are performed across various fields and related objects and across custom fields. Results can be filtered based on objects and Last Updated Date.

Once you enable global search to use the adaptive search engine, you can use the **Configure Global Search** tab to:

- Configure objects to be included in Global search.
- Define attributes to be included in the search results.
- Define the format and content of Title, Line 1, and Line 2 of each matching record's search result.

For more information about how to enable Global Search, see the topics in the Global Search section of the Global and Work Area Search chapter of the sales Implementation Reference guide.



How do I make the currency selection field editable for leads and opportunities?

To allow salespeople select a different currency for leads and opportunities, you must make the Currency field editable. In addition, set up multiple currencies for sales by enabling the **Enable Multiple Currencies for Opportunity Revenue Lines** multicurrency setup profile option.

By default, the currency selection field isn't editable for leads and opportunities. Here's how to make the field editable:

1. Ensure you're working in an active sandbox.
2. Navigate to **Configuration > Application Composer**.
3. In the navigation tree, expand **Standard Objects**, expand **Opportunity** or **Sales Leads**, and click **Pages**.
4. In the region that corresponds to the page you're changing, duplicate the standard layout and edit the resulting layout. For example, if you're making the field editable in opportunities, in the Creation Page Layout region, duplicate the standard layout and then edit the resulting layout.
5. Select the newly created layout, click **Actions** and then click **Edit UI Properties** from the drop-down list.
6. Select **Currency** from the Field Selection drop-down list.
7. Select the custom layout in the Layout Properties section.
8. Click **Update**.
9. Select the **Updatable** option.
10. Click **Submit**.
11. Click **Done** on the Edit UI Properties: Creation Layout window and save your changes.
12. While still in the active sandbox, navigate to **Sales > Opportunities** or **Sales > Leads** as a user who's a sales resource, such as a sales administrator or salesperson. Verify the change by editing an opportunity or lead and validating that the **Currency** field is a drop-down list that users can select.
13. Publish the sandbox according to your company's business practices.

To set the profile option to enable multiple currencies on product lines, see [How can I view the list of currencies I've enabled in the Currency field for my Opportunity?](#)

How can I view the list of currencies I've enabled in the Currency field for my Opportunity?

A salesperson's preferred currency is usually set by default for an opportunity and its product lines. They can also pick a different currency for their opportunities if the Multiple Currencies for Opportunity Revenue Lines profile option is enabled and if the **Currency** field is editable.

Here's how you set the profile option to enable multiple currencies on product lines:

1. In the Setup and Maintenance work area, go to:
 - o Offering: Sales
 - o Functional Area: Opportunities
 - o Task: Manage Opportunity Profile Options
2. On the Manage Opportunity Profile Options page, search for the profile option, Multiple Currencies for Opportunity Revenue Lines Enabled (the code is MOO_REVN_ENABLE_MULTICURRENCY) and select it.
3. Set to **Yes** to allow salespeople select different currencies enabled at the line and header levels in opportunities. Set to **No** to display the default currency only for opportunities and product lines.
4. Save your changes.

Note: In the opportunity and lead edit pages, the Currency list of values is read-only by default. If you've enabled multiple currencies, you can allow salespeople select a different currency by making the **Currency** field editable. See *How do I make the currency selection field editable for leads and opportunities?* for more information.

How do I manage resource organization hierarchy changes?

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

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

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

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

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

Complete these steps to set the value of the Enable End Dating Resource Manager Unconditionally (ORA_HZ_RES_ENABLE_MGR_END_UNCOND) profile option to Yes:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o Task: Manage Administrator Profile Values
2. Search for ORA_HZ_RES_ENABLE_MGR_END_UNCOND and view or change the profile value.

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

How do I run the Perform Object Sharing Rule Assignment Scheduled Process?

The Perform Object Sharing Rule Assignment scheduled process assigns rules to access group assignment objects each time you add an access group and share the rules. You schedule and run this process from the access groups Monitor page.

Unless you create a schedule for it to run, the process runs automatically at certain times to make sure all object data for your selected access groups is up to date. You can, of course, submit the process manually if, for example, you want immediate access to new records and objects.

Note: If you disable automatic scheduling of the process, you must either create your own schedule for the process or run the process manually. You can do both tasks from the Perform Object Sharing Rules Assignment subtab on the Monitor page. For more information about automatic scheduling, see *Scheduling Options for Object Sharing Rules Assignment Processing*.

Steps to Run the Access Group Assignment Process

1. On the Access Groups page, select the Monitor tab.
2. On the Perform Object Sharing Rules Assignment subtab, click **Start Process**.
3. On the Schedule Process page, enter these values in the Basic Options region.

Field	Entry
Work Object	Select the work object you want from the drop-down list.

Field	Entry
Record Selection	You can run the assignment process for all records or for a subset of records by selecting the appropriate option from the Record Selection list. ○ The first time you schedule the job, select the All records option. After that, avoid processing delays by selecting the All records option only when it's essential. For example, when you activate and enable rules for a new object. Tip: You might want to run the object sharing rule assignment process for an individual record (for each type of object) and confirm the access group rule processing is correct before processing all records for an object. ○ In general, schedule the process to run for a subset of records using one of these options. - Records Since Last Run - Records updated in last 'X' days - Records updated in last 'X' hours - Records updated between dates - Single record It's recommended that you select the Records Since Last Run option in most cases. This option runs the job for only those records that were updated since the last time the process was run for the object, or for records that failed or were missed during the previous run of the job. If the job has never been previously run for the object, then all records are processed. Using this option reduces job processing time and ensures that changes to object rules are processed for all relevant records. Here are some examples of how you can use the other options: - If you've scheduled the job to run every hour, select Records updated in last 1 hours. - If you've scheduled the job to run every 4 hours, select Records updated in last 4 hours. - If you've scheduled the job to run daily, then select Records updated in last 1 days.
Diagnostic Mode	Run the process in diagnostic mode to troubleshoot any issues with access group rules processing. When you run the process in this mode, access group rule changes aren't committed. Instead an output log is generated with details of the rules processing. You can use these details to troubleshoot any issues with access group rules assignment. For example, the log helps you understand why certain rules weren't applied as expected.

4. The first time you run the process click **Submit** to run it immediately.

Alternatively, if you've disabled dynamic scheduling and want to create your own schedule for the process, or if you want to create an additional schedule to supplement the default schedule, use these steps:

- a. Click **Advanced**.
- b. In the Advanced Options region, click the Schedule tab.
- c. Select the **Using a schedule** option.
- d. Select how often you want to run the process in the **Frequency** field.
- e. Enter start and end dates for the process.
- f. Click **Submit**.

Depending on your settings, your process runs immediately or at the intervals you specified. You can monitor its progress in the process table on the Perform Object Sharing Rule Assignment page.

Can I modify the phone types for accounts and contacts?

Phone types for accounts and contacts are stored in the lookup type, `ORA_HZ_PHONE_TYPE`. While you can't disable the existing ones, you can rename them.

Here's how:

1. In Setup and Maintenance, go to the following:
 - 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 code, **`ORA_HZ_PHONE_TYPE`**.
3. Here are the available values for sales:
 - Mobile
 - Work
 - Home
 - Fax
 - Land
4. Edit the meanings as needed.
5. Click **Save and Close**.

Can you add extra columns to a fixed choice list field?

No. A fixed choice list is a field that contains a list of static values populated from an FND lookup type. The fixed choice list displays the lookup type's values in a single column, and you can't add more columns to this field.

You can, however, make the values in a fixed choice list more descriptive, which could help users more easily make a selection at runtime. To do this, access the lookup type in the Setup and Maintenance work area and modify the meanings for each value in the lookup type.

Or, you can instead create a dynamic choice list field in Application Composer. Dynamic choice list fields can display multiple columns in the list of values at runtime.

How frequent are updates to Oracle licensed geography reference data available?

The geography reference data is updated on a quarterly basis but the update of the latest geography reference data refresh isn't automated. You will be informed about the geography reference data refresh using release readiness documents.

How do I import activity contact data?

You can use Import Management to create, update, or delete your activity contact data.

You can import activity contact records using these steps:

1. Map your source activity contact data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the activity contact data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import activity contact data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .csv file for a successful import

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- **Public unique identifiers:** If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- **Source system and source system reference:** Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new activity contacts or are updating activity contacts that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Activity Contact Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for activity contact records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Contact record	Updating an Existing Activity Contact record
ActivityId	The internal identifier of the activity to which the contact is associated.	Automatically generated by the import process if creating a new activity record.	The value is generated automatically by the import process if creating a new activity record.	A value is required if you're updating an existing activity and you're not providing other values to identify the activity record. To update an existing activity, choose one of the following options to identify the record: • The unique ID for the record (ActivityId). • The activity number (ActivityNumber). • The source system code and reference

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Contact record	Updating an Existing Activity Contact record
				(OrigEntityNumber and OrigEntityCode).
ActivityNumber	The public unique identifier of the activity to which the contact is associated	If a value is provided while creating a new activity, the value must be unique. For update, you can determine the existing unique value of the object by exporting the Activity object. Navigate to the following in the Setup and Maintenance work area: - Offering: Sales - Functional Area: Data Import and Export - Task: Schedule Export Processes The table ZMM_ACTY_ACTIVITIES with column ACTIVITY_NUMBER holds the existing value.	A value is required if you're creating a new activity.	A value is required if you're updating an existing activity and you're not providing other values to identify the activity record. To update an existing activity, choose one of the following options to identify the record: - The unique ID for the record (ActivityId). - The activity number (ActivityNumber). - The source system code and reference (OrigEntityNumber and OrigEntityCode).
ContactId	The party of type person who's involved with this appointment..	If no value is provided, the corresponding value from the Contacts production table is used.	A value is required if you're associating a new contact to an activity. One of the following must be provided while creating a contact: - ContactId - ContactPartyNumber - Combination of ContactOrigSystem and OsrContactId	To update or delete an existing activity contact, select one of the following options to identify the record: - The unique ID for the record (ActivityId, ContactId). - The activity number (ActivityNumber, ContactId). - The source system code and reference (OrigEntityNumber and OrigEntityCode).
ContactOrigSystem	The source system for the activity with which the contact is associated.	No Validation	A value is required if you're associating a new contact to an activity. One of the following must be provided while creating a contact: - ContactId - ContactPartyNumber - Combination of ContactOrigSystem and OsrContactId	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Contact record	Updating an Existing Activity Contact record
ContactPartyNumber	The party number of the contact.	This must be a valid party in the HZ_PARTIES table.	A value is required if you're associating a new contact to an activity. One of the following must be provided while creating a contact: - ContactId - ContactPartyNumber - Combination of ContactOrigSystem and OsrContactId	This must be a valid party in the HZ_PARTIES table
CorpCurrencyCode	The corporate currency used by the activity to which the contact is associated.	If no value is provided, the corresponding value from the Contacts production table is used.	If no value is provided, the corresponding value is used from the Contacts production table.	If no value is provided, the corresponding value is used from the Contacts production table.
OrigEntityCode	The code indicating the original source of the activity the activity to which the contact is associated.	Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION. Note: If the record was created in the Activity Management component, the value is ACTIVITY.	Valid values for upgraded records are TASK, APPOINTMENT, or INTERACTION. Note: If the record was created in the Activity Management component, the value is ACTIVITY.	A value is required if you're updating or deleting an existing activity and you're not providing other values to identify the activity record. To update or delete an existing activity you must choose one of the following options to identify the record: - The unique ID for the record (ActivityId). - The activity number (ActivityNumber). - The source system code and reference (OrigEntityNumber and OrigEntityCode).
OrigEntityNumber	The ID that identifies the entity record in the original system..	If the internal action code is 'INSERT' and OrigEntityNumber and ActivityNumber are NULL, then it will be defaulted to the provided value. If no value is provided, the corresponding value from Contacts production table is used.	If the internal action code is 'INSERT' and OrigEntityNumber and ActivityNumber are NULL, the value will be set to the value provided by the user. If no value is provided, the corresponding value is used from the Contacts production table.	A value is required if you're updating or deleting an existing activity and you're not providing other values to identify the activity record. To update or delete an existing activity you must choose one of the following options to identify the record: The unique ID for the record (ActivityId).

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Activity Contact record	Updating an Existing Activity Contact record
				- The activity number (ActivityNumber). - The source system code and reference (OrigEntityNumber and OrigEntityCode).
OsrContactId	The source system reference of the contact..	The contact must exist in system. You can determine the original system reference for the Contact by exporting the Contacts object. Navigate to the following in the Setup and Maintenance work area: - Offering: Sales - Functional Area: Data Import and Export - Task: Schedule Export Processes	A value is required if you're associating a new contact to an activity. One of the following must be provided while creating an assignee: - ContactId - ContactPartyNumber - Combination of ContactOrigSystem and OsrContactId	The contact must exist in system. You can determine the original system reference for the Contact by exporting the Contacts object. Navigate to the following in the Setup and Maintenance work area: - Offering: Sales - Functional Area: Data Import and Export - Task: Schedule Export Processes
OsrContactOrgId	The source system reference to the contact organization. It is used to update the RELATIONSHIP_ID in the interface table (ZMM_IMP_ACTY_CONTACTS) based on HZ_PARTIES.	This must be a valid organization type in the HZ_PARTIES table.	This must be a valid organization type in the HZ_PARTIES table.	This must be a valid organization type in the HZ_PARTIES table.

Go to **Navigator > Tools > Import Management > Import Objects**, to see all the attributes of the activity contact object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

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

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

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [How You Use Alternate Keys to Import Records](#)

How do I edit the data access permissions for a custom role and an object?

You can update existing and future-dated policies for a custom role and object, and grant access to new subsets of data for the role, using the Active Policies edit page of the Sales and Service Access Management work area.

For example, you can:

- Add or remove all access to individual policies
- Configure read, update, and delete permissions for a specific policy
- End-date policies to inactivate them
- Configure advanced permissions for policies

Follow these steps to edit the permissions to object data for a custom role.

1. Sign in to the application as a user who has either the IT Security Manager or Customer Relationship Management Application Administrator job role.

2. Select **Navigator > Tools > Sales and Service Access Management**.
3. On the Sales and Service Access Management page, click the Manage Data Policies tab.
4. Search for or select a role in the **Role** field.

You can't edit policies on predefined roles, so search for and select a custom role. For example, if you copied the predefined Salesperson role to create a custom version of the role, you could select it.

5. Select an object in the **Object** field, for example, select the **Sales Lead** object.

Note: Select the Trading Community Party object to view access policies for both accounts and contacts.

6. Click **Find Policies**.
7. Click the **Edit** icon and the Active Policies edit page for the selected role and object is displayed.

The Access Policies table shows all available policies for the selected role and object by default but you can use the **Show Conditions** filter to display only policies that are granted or only policies that aren't granted.

8. Configure the access provided to the selected object for the selected custom role by selecting or deselecting the **Read**, **Update**, or **Delete** checkboxes for a policy.

For example, if you're editing policies for a custom Salesperson role and the Sales Lead object, you can perform data configuration tasks such as:

- Restrict the ability to delete leads to lead owners by finding any policies that provide lead access to team members and deselecting the **Delete** checkbox for these policies.
 - Allow sales representatives to view retired leads by finding the policy that grants this access, then clicking the **Read** checkbox.
9. You can remove all access granted by a policy. For example, if your company doesn't use territory access, you can remove territory access to lead data using one of the following methods:
 - Review the Condition column to find the policies that grant territory access, then deselect the **Read**, **Update** and **Delete** checkboxes for each of these policies.
 - End-date the policies so that they're no longer active by selecting a date that has passed in the **End Date** field, for example, select yesterday's date.

Note: To reactivate a policy that's deactivated, reassign the appropriate read, update, and delete permissions to the relevant criteria and specify a start date for the policy.

10. If a policy has an advanced permission associated with it, then you can edit the advanced permission to specify more granular levels of access to the object.

For example, a policy might provide full access to lead data for a resource in the territory assigned to the sales lead. You can restrict this access by selecting the policy, then scrolling to the Advanced Permissions table for the policy. You can remove update access to the lead data but retain read access by deselecting the **Update** checkboxes.

Note: You can update the advanced permissions for a policy only if the related permission in the parent row in the Access Policies table is checked. For example, if the read permission in the parent row of a policy isn't selected, none of the read permission options in the Advanced Permissions table can be edited.

11. Click **Save and Close**.

Your changes are saved and the Manage Data Policies page is displayed where you can review your changes. If you've end-dated a policy, note that the number in parentheses beside the **Inactive policies** checkbox is incremented.

Related Topics

- [How do I create and manage access groups?](#)

How do I enable mass update of records?

Salespeople can use the mass update feature to bulk update fields on multiple records. They can update multiple fields on several object records at once, without opening each individual record.

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

Here's the setup flow:

1. Add the Update action to the landing pages of the work areas where you want to enable the feature. Landing pages are the only pages that support the mass update feature.
2. Optionally, configure which fields salespeople can update. You can use the default fields already set if you want. Or you can configure the list yourself.
3. Optionally, set profile options to specify how many records salespeople can update at once. You can use the default value of 25 records if you want.

Supported Objects for Mass Update

These are the predefined, standard business objects that support mass update:

- Activities
- Accounts
- Assets
- Contacts
- Sales Leads
- Opportunities

Custom objects also support mass update.

Add the Update Action

Salespeople access the mass update feature using the Update action that you enable in the work area landing pages of classic Sales. The action appears as **Actions > Update** on the landing page toolbar.

Remember, make all Application Composer changes in a sandbox and publish the sandbox according to your company's processes.

These steps use the Opportunity object's landing page as an example. The basic steps are the same for all objects, but the navigation can be different for different objects. See the Landing Page Names in Application Composer section in this topic for the page names and navigation.

1. Navigate to **Configuration > Application Composer**.
2. Expand the **Standard Objects** tree and then expand the object you want to modify. For example, expand the **Opportunity** object.
3. Within the object you're modifying, click the **Pages** node.

4. Ensure that the **Application Pages** tab is selected.
5. In the **Landing Page Layouts** region (use the **Activities** region for the Activities object), select the **Standard layout**, and then click the **duplicate layout** icon to duplicate and edit the resulting copy. Alternatively, you can edit an existing, custom layout.
6. Now, edit the new layout. For example, to edit the Opportunities landing page, click the **edit** (pencil) icon on the Fuse Opportunity Overview Table.
7. In edit mode for the landing page, navigate to the Configure Detail Form: Buttons and Actions region.
8. In the Available Actions window, double-click the **Update** action to move it to the Selected Actions window.
9. Click **Save and Close**, then **Done**.
10. Test the changes using the steps in the Test the Changes section later in this topic.

Set the Updatable Fields

Now that you have enabled the Update action, configure the fields salespeople can update using mass update. Each object already has several fields enabled for the mass update feature. If you want, configure this list to include other standard fields, or even custom fields. Keep in mind that if you're setting up the mass update feature for custom objects, then you must configure the list of fields that can be updated by users -- it's not optional like with standard objects.

You configure the list of mass update fields using the same custom landing page layout where you manually displayed the Update action:

1. In Application Composer, navigate to the Pages node for the object you're configuring.
2. Edit the same landing page layout where you manually displayed the Update action in the above procedure.
3. Navigate to the **Configure Mass Update Fields** region.
4. In the Available Fields box, double-click the fields that you want to make available for the mass update feature at runtime. Or, use the arrows to move the items that you want to make available. See the Rules for Certain Field Types below for some details on field types and limitations or behavior.
5. After you're done making changes, click **Save and Close**, then **Done**.

Rules for Certain Field Types

Consider these rules for certain field types as you set up the feature:

- You can use both standard and custom fields. However, read-only fields, such as formula fields, and fields that can be conditionally updated, aren't included in the list.
- Some fixed-choice list fields are related in a parent-child relationship. This simply means that the values displayed in the child field are dependent on whatever is selected in the parent field. If you want to make a child fixed choice list field available for the mass update feature, then you must also include its parent field.

Configure the Number of Updatable Records

You can configure the maximum number of records that users can update at once by setting profile options.

Here's the behavior:

- The default value of the profile options is 25, meaning the maximum number of records that salespeople can update at once for those objects is 25.
- The maximum number of records that can be updated at once is 500.
- If a profile option value has a null value, the application sets the number of records that can be updated at once to 10.
- For custom objects, the threshold value is set at 25 and can't be changed using a profile option.

Here are the mass update threshold profile options. The profile option codes are listed in parentheses.

Object	Profile Option
Activity	Activity Mass Update Threshold Value (ZMM_MASS_UPDATE_THRESHOLD)
Account	Mass Update Threshold Value (ZBS_MASS_UPDATE_THRESHOLD)
Asset	
Contact	
Sales Lead	
Opportunity	
Custom objects	

Set the Profile Options

1. In Setup and Maintenance, go to:
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o Task: Manage Administrator Profile Values
2. In the search region of the Manage Administrator Profile Values page, enter the profile option name in the **Profile Display Name** field. Or, enter the code in the **Profile Option Code** field.
3. Click **Search**.
4. In the list that's returned, click the profile option name link.
5. Set the profile option value as needed.
6. Save your changes.

Test the Changes

It's a good idea to test the changes. For example:

1. Sign in as a user who has access to the object you just modified, such as a sales representative or sales manager.
2. Go to the landing page and click the Actions menu to verify that the **Update** action is available.
3. Go through the mass update flow with some records to be sure it's working as you expect. See the Related Topics for the procedures.

Landing Page Names in Application Composer

As you modify the landing pages, it's helpful to know their names in Application Composer. Here are the pages, along with the navigation steps to get to them:

Object in Application Composer	Navigation to Landing Page Layout	Name of the Landing Page You Need to Edit
Activity	Activity > Pages > Application Pages > Landing Page Layouts > Activities region	My Activity Overview Table

Object in Application Composer	Navigation to Landing Page Layout	Name of the Landing Page You Need to Edit
Account	Account > Pages > Application Pages > Landing Page Layouts	FUSE Account View List Table
Asset	Asset > Pages > Application Pages > Landing Page Layouts	Asset Overview Table
Contact	Contact > Pages > Application Pages > Landing Page Layouts	Fuse Contact List Table
Sales Lead	Sales Lead > Pages > Application Pages > Landing Page Layouts	Fuse Lead Overview Table
Opportunity	Opportunity > Pages > Application Pages > Landing Page Layouts	Fuse Opportunity Overview Table

Related Topics

- [How do I apply mass update to accounts and contacts?](#)
- [How can I enable the Mass Update feature in Workspace?](#)

How can I add custom objects, custom child objects, and custom fields to Workspace UI?

Users with permission to extend Workspace can access a custom object and search on it from the Workspace UI, search on one or more fields within the custom object, retrieve search results, and create saved searches for the custom object.

Fields are searchable both in the Search box and in filters. Searching on top-level custom objects and their custom child objects is supported. Custom child objects of standard objects are also supported.

Note: Custom objects created in the Enterprise Resource Planning (ERP) and Supply Chain & Manufacturing (SCM) application suites aren't supported by Adaptive Search.

Adaptive Search supports predefined relationships between the ready-to-use standard business objects. It also supports one-to-one and one-to-many custom relationships between standard and custom objects.

Note: Custom long texts aren't supported.

Custom fields and custom child objects must be published from the sandbox before you configure Adaptive Search to include them. You can't configure Adaptive Search inside a sandbox. Follow this standard process:

1. Create the custom fields and custom child objects using Application Composer while working in a sandbox.
2. Publish the sandbox.

3. With no sandbox open, configure the search behavior you want in Adaptive Search and publish the new configuration.

Note: If you've dynamic choice list fields included from a custom object to a standard object, such as an Opportunity, then the standard object attributes that you selected by setting the **Include in Object Reference** checkbox are displayed in the custom object list page. However, the custom object attributes won't be available in the standard object list page because dynamic choice list fields aren't supported from standard objects to custom object.

Synchronization of Custom Objects, Custom Child Objects, and Custom Fields to Workspace

When you launch the Workspace search configuration, all custom attributes published using Application Composer and the sandbox are synchronized to the Workspace configuration UIs. It might take a little time to sync all custom objects, custom child objects and custom fields to the Workspace search setup. If the searchable attribute is set to true in Application Composer, all custom attributes for standard top-level objects and custom objects are enabled for indexing by default. However, if the searchable attribute that you want isn't set to true, then you must explicitly enable it for indexing.

Setup is done on the Advanced setup tab. You select the business object you want to set up in the left pane of the tab, and set the object's search properties in the right pane. See the topic [How Search Action is Modified](#) for more information.

How do I make a field searchable in the UI?

You can enable additional fields for search, including custom ones. You can also remove existing fields from use.

By default, the work areas powered by Adaptive Search include all of the key fields you need for search. (See the topic [Adaptive Search Configuration Provided by Oracle](#) for a list.)

To make the field searchable in work areas powered by Adaptive Search and Global Search, including Sales in the Redwood User Experience, involves these steps:

1. You must make the field searchable for its business object.
2. Optionally, you can enable the field for search of a related object.
3. You must publish your configuration.

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

This example shows you how to enable the Chief Executive Name field, a standard application text field, but the same procedure applies to any field, even a custom field on a standard application object. When you're done with this configuration and publish it, a salesperson can enter the CEO name, in either Global Search or in the search box for those work areas powered by Adaptive Search, to find the account where the person is the CEO. The search also returns all of the opportunities for that account when you enable opportunities to be searched by account fields.

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

Edit Account: Acme (SAN FRANCISCO, US): Profile

Actions Save Save and Close Cancel

Overview

Profile

Name: Acme

Type: Prospect

Industries:

Organization Type:

URL:

Owner:

Chief Executive Name: Joe Smith

Address:

Attachments: None

Primary Contact:

Contact Phone:

Contact E-Mail:

Parent Account:

Manage Account Hierarchy

Make the Field Searchable in Its Business Object

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

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

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

The field is listed in the Configure Fields section.

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

Note: For fuzzy search to work, the first 3 characters of the word should match and in the remaining part of the word there can be 1 character difference. This can be changed to 2 characters difference if needed, but the first 3 characters still need to match.

6. Select the **Include in Keyword Search** option to enable the field for both Global Search and search using the Workspace search box.

If you leave this check box deselected, users can't search for accounts using the CEO name. But in Workspace, they can still add the Chief Executive Name field as a filter for accounts and search the field there. Global Search doesn't permit you to add filters, only to search by keyword.

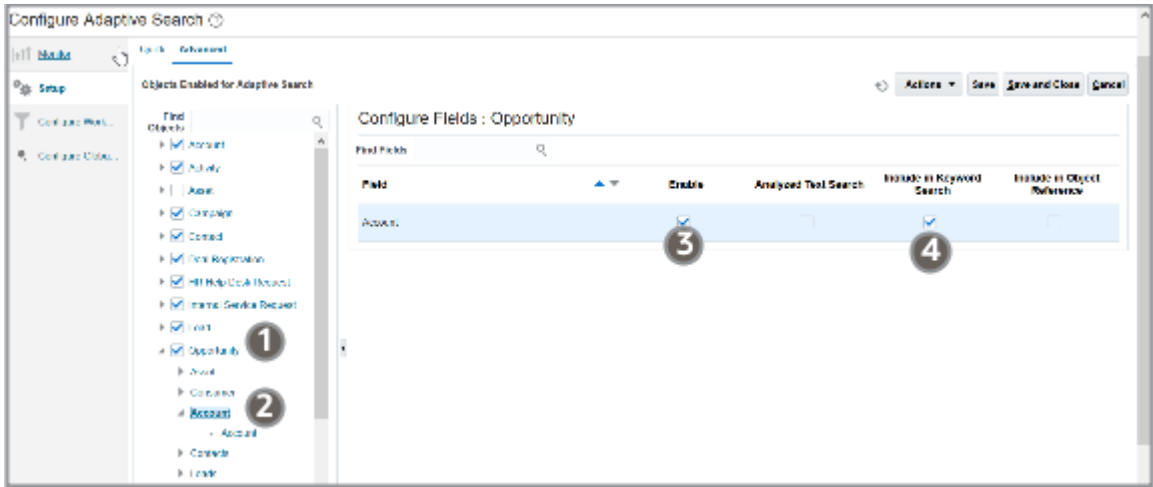
7. Select the **Include in Object Reference** option to enable the field for search in related objects. You can enable up to 15 fields. Make the selection if you want to use the CEO name when searching for opportunities, for example.

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

Make the Field Available for Searching a Related Object

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

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



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

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

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

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

Publish Your Configuration

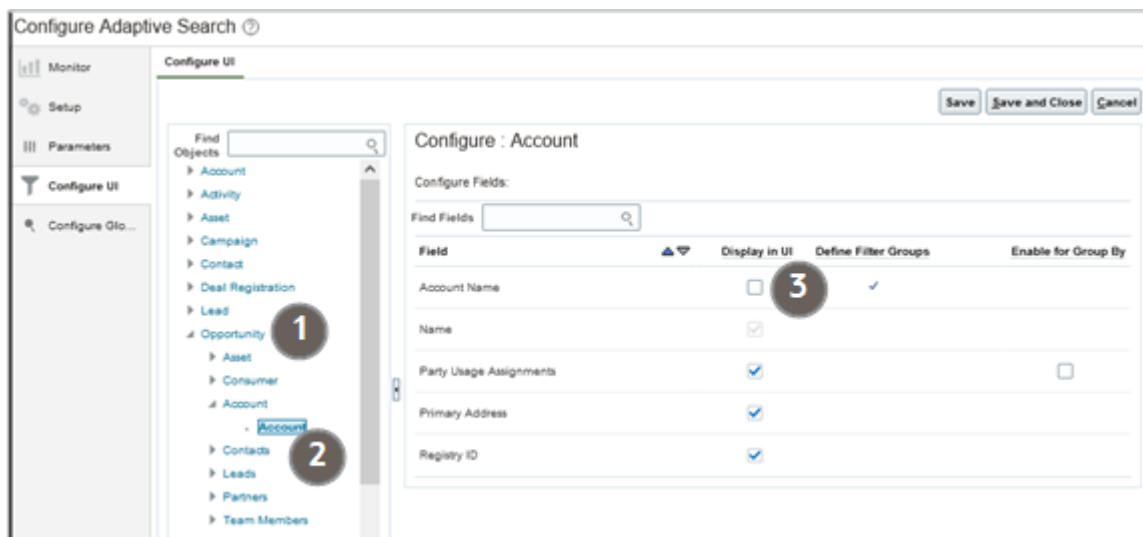
After making your option selections, click **Publish**.

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

Enable the Field for Use As a Filter in the UI

For the field to be used as a filter and added as a column in search results, you must enable it for display on the UI:

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



4. Click **Save and Close**.

Related Topics

- [Adaptive Search Configuration Provided by Oracle](#)

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:
 - o If you're making the saved search available to the whole sales organization, select **Everyone**.
 - o 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.

How do I create and manage saved searches in classic Oracle Sales?

You can save any search on list pages. The saved search includes all the filters you added, and the columns that appear in the list of results. As a sales administrator, you can create different saved searches for different roles in the organization and you can specify a default saved search for each object.

Note: Both the classic and the Redwood user experience versions of Oracle Sales share the same saved searches. Which UI administrators use to create and manage them doesn't matter. The result is the same. Salespeople can use the saved searches in any of the UIs that use Adaptive Search. In Oracle Sales in the Redwood User Experience, this includes all list pages and some lists of values (smart pickers). In classic Sales, this includes Workspace and the work areas powered by Adaptive Search. The saved searches you create are also available in CX Sales Mobile.

You can create and manage saved searches for different roles and for your own personal use. You can also assign a unique default saved search for each role. A default saved search is the search a user sees when first opening Workspace. Salespeople can't replace or edit default saved searches assigned to them by their sales administrators. To view the assigned default saved search, or to assign a default saved search to a user role, you must have permission to view the object underlying the saved search. Sales users can create their own personal saved searches, manage them,

and assign their personal default saved search. These saved searches take precedence over what you, as administrator, has assigned to them. You create and manage saved searches from the Workspace UI rather than from the Configure Adaptive Search page.

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

Note: To create and manage saved searches you must have the privilege ZCA_VIEW_ADAPTIVE_SEARCH_WORKSPACE_PRIV.

Overview of Manage Saved Searches UI

The Manage Saved Search UI contains the **My List** tab, **Workspace List** tab, and **Set Defaults** tab. These allow administrators to manage their personal list of saved searches, assign saved searches to roles, and assign default saved searches to roles, respectively. These tabs are only exposed to administrators to:

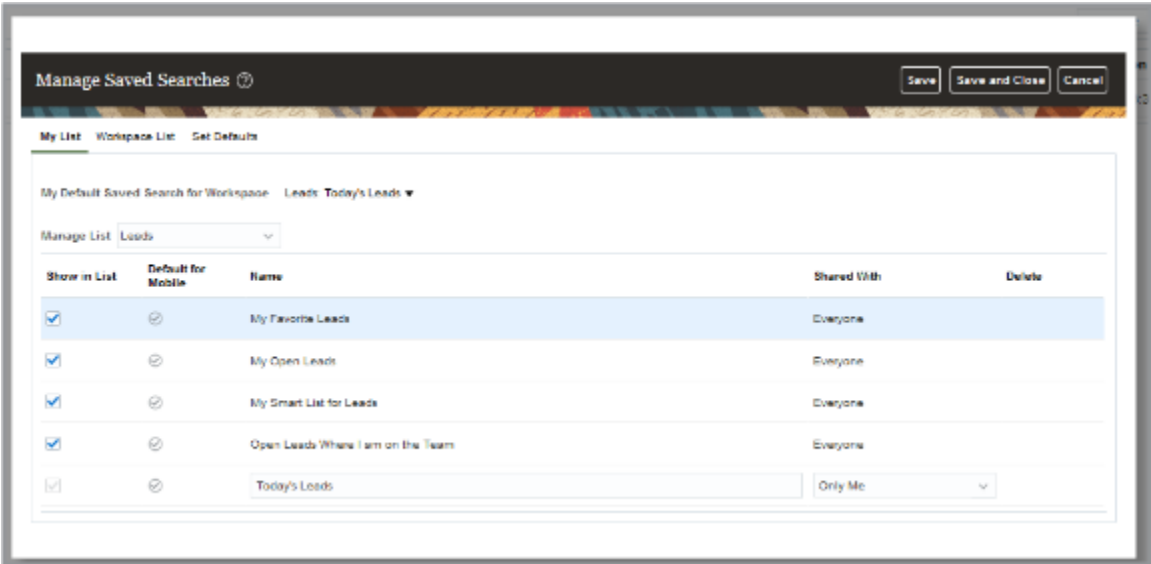
- Assign saved searches for user roles
- Assign a default saved search for roles
- Change a default saved search for roles
- Perform overall role-based administration

Note: Workspace users can manage their own personal saved searches from the Manage Saved Searches page but they won't have access to the My List, Workspace List, or Set Defaults tabs. However, mobile app users can override these restrictions and set their own default searches, too. This feature helps to display the most relevant records in their mobile app with a single tap on the menu.

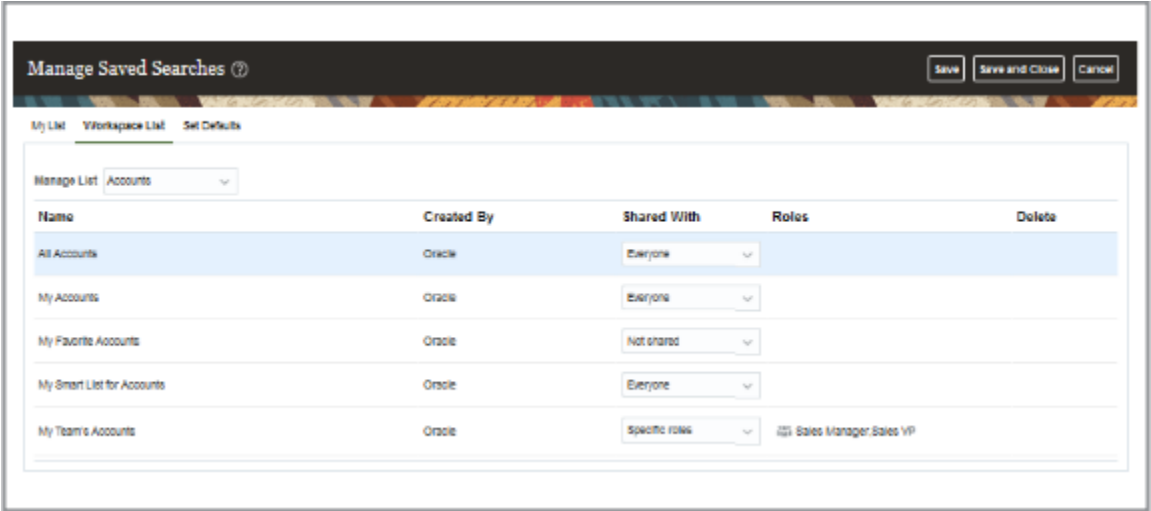
All sales users can create saved searches for themselves. But sales administrators can create saved searches for the whole sales organization and for specific sales roles. A default saved search is the saved search that's automatically displayed when the user first accesses Workspace. Oracle delivers predefined default saved searches for some user roles and the search results returned depends on what role is assigned. For example, ready-to-use partner roles include Partner Sales Representative, Partner Sales Manager, and Partner Administrator.

From the **My List** tab, you can manage your own personal saved searches solely, separate from the saved searches that are shared with the broader organization. Here's a screenshot of the My List window.

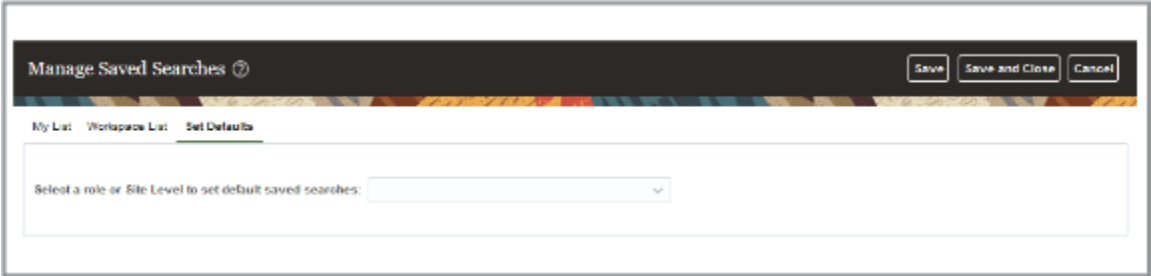
Note: Mobile app users can select the save searches they want from the **Default for Mobile** column.



From the **Workspace List** tab, you can share and manage saved searches with other roles. You can designate saved searches as shared with everyone, with specific user roles, or with no one. Here's a screenshot of what the Workspace List window looks like.



The **Set Defaults** tab enables you to define the default saved search for each user role. However, to assign a default saved search, you also must have permission to view that specific default saved search. Otherwise it won't appear in the list of saved searches to assign. Here's a sample screenshot of the UI.



For example, if you select Site Level, the following default saved search options are displayed for Accounts:

- All Accounts
- My Accounts
- My Favorite Accounts
- My List for Accounts

Object	Default Saved Search
Accounts	My Accounts
Activities	Select...
Campaigns	All Accounts
Contacts	My Accounts
Leads	My Open Leads
Opportunities	My Open Opportunities
Partner Contacts	
Partners	
Quote and Order Lines	My Active Quote Lines
Quotes and Orders	My Active Quotes

If you select a specific role, such as Sales Representative, then you might want to select the My Accounts option as your default saved search as shown in this sample screenshot.

Object	Default Saved Search
Accounts	My Accounts
Activities	My Open Tasks
Campaigns	Select...
Contacts	My Contacts
Leads	My Open Leads
Opportunities	My Open Opportunities
Quote and Order Lines	Select...
Quotes and Orders	My Active Quotes
Service Requests	Select...

Create a Saved Search

Here's how you can create a saved search either for yourself or for others in the organization. The saved searches you create are available for selection in Workspace and also appear as filters in the actionable infolets and Workspace infolets. The saved searches are listed in alphabetic order.

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

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

The screenshot shows the 'Workspace' interface. At the top, there's a search bar and a filter for 'Primary Industry: Health & Fitness'. Below this, a table lists accounts. Callout 1 points to the 'Save As' button (a plus icon with a list) in the top right of the table. Callout 2 points to the 'Export List' button. The table has columns for 'Name' and 'Primary Address'.

Name	Primary Address
24-7 ProFitness	59 Summit Way, YOUNGSTOWN, OH 44555
Acadia Gym	6815 Southoff Place, KANSAS CITY, MO 64149
Advanta Gym	4412 Stillwater Ave, CHEYENNE, WY 82009
Aegon Fitness Gym	9287 Thompson Circle, SEATTLE, WA 98115
Aevi Genomic Gym	4595 Las Vegas Blvd S, LAS VEGAS, NV 89109
Akebia Gym	6856 Harrison Ave, BUTTE, MT 59701
Alaska Gym	901 W 6th Ave, ANCHORAGE, AK 99501
Alpine Gym	2 Carberry Park, PROVIDENCE, RI 02912

Below the table, there's a 'Create Saved Search' dialog. It has a 'Name' field with the value 'Health & Fitness Accounts', a checkbox for 'Set as my default saved search', and a 'Shared' dropdown menu set to 'Everyone'. There are 'Create' and 'Cancel' buttons at the bottom right.

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:
 - o Only Me
 - o Everyone
 - o Specific Roles
8. If you selected **Specific Roles**, click **Search** (the people icon) and select the job roles.
9. Click **Create**.

Related Topics

- [How can I view and assign a default saved search for a role?](#)
- [Why does the Default Saved Search field display with either no name or with a Select drop-down list?](#)

Why can't I find users to add as a resource in the Resource Directory?

You can use the Resource Directory to view all the existing resources within your organization and add party records as sales resources.

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

What are the roles or privileges needed for accessing Survivorship Rules?

While working with Survivorship Rules, check if you have the following roles and privileges:

- ORA_ZCH_CDM_ADMIN_DUTY
- ORA_CRM_EXTN_ROLE
- ZCX_MANAGE_EXTENSIBLE_OBJECT_PRIV

How can I make sure the sales territory hierarchy mirrors the resource hierarchy?

If you've enabled sales forecasting by territory owner, your territories mirror your resource hierarchy and organizations. When your resource hierarchy changes, you must run the Refresh Territories from Resources process to reflect the changes in the territory structure. This process doesn't apply if you didn't enable forecasting by territory owner and you're using territory dimensions for assignment and forecasting.

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**.

Can I set up CX Sales Mobile to display a home page infolet?

You can't display the infolets you see on the home page of the web application in CX Sales Mobile setup. While you can't display the infolets themselves, you can create a BI report with the same information and make that report accessible from the View Reports card on the mobile home page.

What can I do if the "What's Around Me?" mapping feature isn't working in CX Sales Mobile?

For the What's Around Me? feature to work, you must ensure that the address and geolocation attributes for Account, Contact, and Lead are selected for Object Reference in Adaptive Search setup.

1. Make sure the feature is set up as described in the topic *How do I set up the "What's Around Me?" maps feature?*
2. Navigate to the Setup and Maintenance work area, and open the **Configure Adaptive Search** task:
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o Show: All Tasks
 - o Task: Configure Adaptive Search
3. On the Configure Adaptive Search page, Setup tab, click **Advanced**.
4. In the left pane select the appropriate path, make sure the attribute is enabled, and then select the **Include in Object Reference** option to enable the field for search in related objects and in CX Sales Mobile.

Path	Field to Enable
Account > Primary Address	PrimaryAddress
Account > Primary Address > Address	GeoLocation
Account > Addresses > Address	GeoLocation
Contact > Primary Address	Address
Contact > Primary Address > Address	GeoLocation
Contact > Addresses > Address	GeoLocation
Lead	GeoLocation

5. Click **Publish**. Publishing triggers an indexing process that you can monitor by clicking the **Monitor** tab and then the **Publish** subtab. Your new configuration is available when the indexing process completes.

How can I create a BI report of the notes associated with a sales lead?

To create a BI report of notes associated with leads, use the following SQL query.

```
select * from fusion.ZMM_NOTES where SOURCE_OBJECT_CODE='LEAD'
```

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.

What's the best practice for assigning sales team members to accounts?

The most efficient way of assigning sales team members to accounts is to set up sales territories. When you use sales territories for sales team assignment, there's no limitation on the number of records you can process, and you assure data integrity, quality, and your assignment is free from human errors.

I didn't set up sales territories, so how can I use quotas, a feature that requires them?

If you didn't set up sales territories because you don't need them for autoassignment, you can quickly set up the sales territories required for your quota setup. Using Simplified Sales Forecasting (Quick Setup), you can set up sales territories that automatically mirror your sales resource hierarchy with one click. The territories that get created assure that the opportunity owners are also the territory owners. This feature was created to enable forecasting for customers who don't use sales territories for assignment and works for quota setup as well.

You can skip this setup if you already enabled Forecasting by Opportunity Owner in the Setup Assistant.

Assure you set up these prerequisites.

1. Set up your accounting calendar. The periods must be either monthly or quarterly.
2. Set up your hierarchy of sales resources.

To enable forecasts:

1. Enable one territory dimension and activate.
 - a. In the Setup and Maintenance work area, go to the following:
 - Offering: Sales
 - Functional Area: Territories
 - Task: Enable dimensions and Metrics
 - b. Click **Select and Add** to enable one dimension, such as Account Type.
 - c. Save and close.
 - d. Click **Load and Activate**.
2. Create at least one opportunity with a future close date.
3. In the Setup and Maintenance work area, go to the following:
 - o Offering: Sales
 - o Functional Area: Sales Forecasting
4. Click Quick Setup, the gear icon in the Functional Area.
5. In the Configure Simplified Sales Forecasting page, the two options are selected for you. Click **Submit**.

Your submission sets up all these areas for you.

- You've a territory hierarchy to match your sales resource hierarchy, with the resources as territory owners. The Refresh Territories from Resources process synchronizes your territories to match your latest resource hierarchy. The territories have Resource-Centric coverage and are called Resource-Centric territories. (The process requires at least one enabled territory dimension.)
- Opportunities are automatically assigned to territories by owner.
- Forecasts roll up the territory hierarchy.
- You forecast quarterly.
- Salespeople can adjust their forecasts each month if your accounting period is monthly.
- You can forecast product totals.
- You can use quotas.

- The Forecasting Autopilot process runs every hour.

Remove Your Resource-Centric Territory Hierarchy

If you used the quick setup and then decided you won't use the resource-centric territory hierarchy, you can remove it.

1. Navigate to **Scheduled Processes**.
2. Click **Schedule New Process**.
3. Find **Refresh Territories from Resources**.
4. Click **OK**.
5. In the **Diagnostic Parameters** field, enter `from_resource=-1`
6. Click **Submit**.

How can I assure that the assigned lead owner remains the owner when the lead is converted?

When you assign a lead owner, that lead owner must accept the lead for them to remain the owner of the converted lead. If the lead owner doesn't accept the lead and another salesperson converts the lead into an opportunity, then that second person becomes the owner of the converted lead. You can assure that the assigned lead owners remain the owners of converted leads by creating a Groovy script to automatically accept the lead.

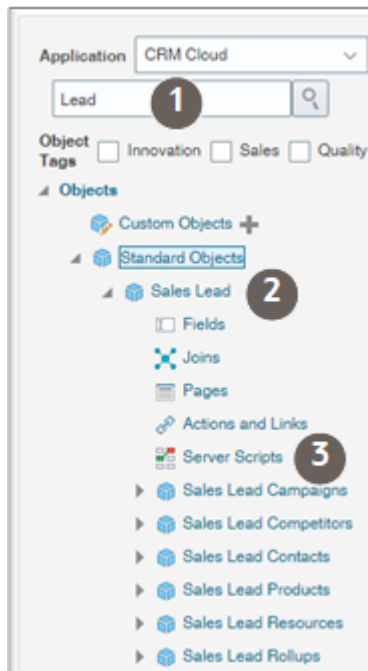
To automatically accept the lead for the assigned lead owner, create a Before Update in Database trigger on the Sales Lead object. Here is a sample script:

```
if (isAttributeChanged('OwnerId') && OwnerId != null){  
    setAttribute('LeadAcceptedFlag', 'Y')  
}
```

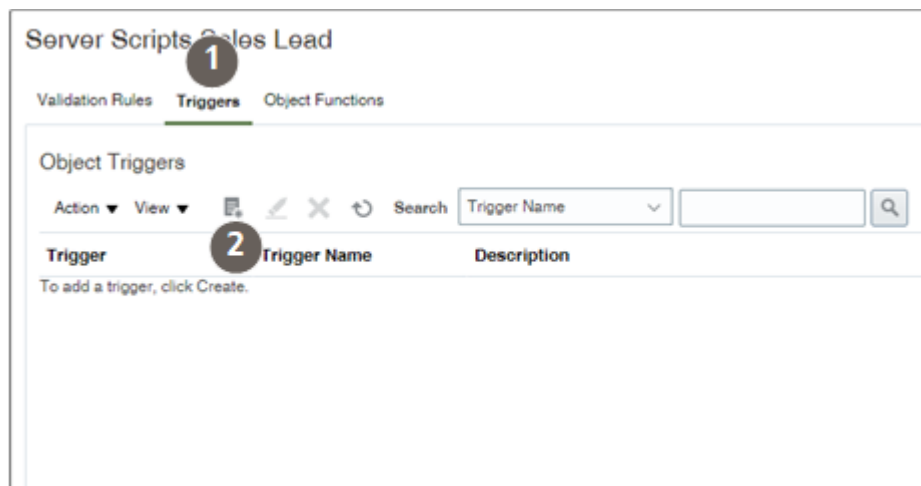
Steps to Create the Trigger

1. Enter a sandbox with Application Composer as one of the tools.
2. Open Application Composer by selecting it from the sandbox **Tools** menu.

3. In the left pane, search for the **Sales Lead** object (callout 1 in the screenshot).



4. Expand **Sales Lead** under **Standard Objects** (callout 2).
5. Click **Server Scripts** (callout 3).
6. In the Server Scripts Sales Lead page, click the **Triggers** tab (callout 1 in the screenshot).



7. Click **Add a new trigger** (callout 2).

8. In the Create Object Trigger page Name Trigger list, select **Before Update in Database** (callout 1 in the screenshot).

Create Object Trigger

Name

Trigger: Before Update in Database (1)

* Trigger Name: Automate_Lead_Acceptance

Error Message ⓘ

Enter a message to display to the user when validation fails.

* Trigger Definition ⓘ

Edit Script

Find: [] < > 🔍 Go to Line: [] 🔍

```
1 if (isAttributeChanged('OwnerId') && OwnerId != null){
2   setAttribute('LeadAcceptedFlag', 'Y')
3 }
4
5
```

 (2)

9. Enter a trigger name.
10. Enter the Groovy script (callout 2).
11. You can validate the script by clicking **Validate** on the right side of the Trigger Definition section.
12. Click **Save and Close**.

You must publish the sandbox for the trigger to become active.

Related Topics

- [Server Scripts](#)
- [Defining an Object-Level Trigger to Complement Default Processing](#)

How do I download and install the external data loader client?

This topic shows how to download and install the External Data Loader Client.

Here are the steps involved in this process:

1. Download and Install the Client
2. Set up Credentials

Before You Start

Ensure that your computer has Java version 1.8 installed.

Ensure that your Operating System is one of these:

- Microsoft Windows 7
- Microsoft Windows 8
- Microsoft Windows 10
- Microsoft Windows 11

Ensure that your Operating System is one of these.

Note: The External Data Loader client doesn't support Java versions higher than version 1.8.

Required Privileges

To download the client, you must have access to My Oracle Support (support.oracle.com). To use the tool to import data into Sales and Fusion Service you must be able to access REST services and import data for the objects.

Prerequisite Steps

The Data Loader client doesn't require any specific configuration within Sales and Fusion Service. However, you must create an import map before using it. The client passes a mapping number value when submitting an import request. You can't create a new import mapping from the Data Loader Client application.

Download and Install the Client

You can download the client from My Oracle Support (Doc ID 2325249.1).

The download contains a ZIP file, with sub-folders. Save the ZIP file to a directory in which the full file path contains no white spaces. You must extract all of the files to a folder on your computer.

Note: When executing the client from the command line the application uses the name `oscdataloader.jar`. For example,

```
> java -jar oscdataloader.jar -h
```

Set up Credentials

You can install and use the client for automated imports while hiding the credentials that are used with the help of the Credential Store. The Credential Wallet holds one set of user credentials (user name and password pair). To save your credentials use the `savepassword` command,

```
> java -jar oscdataloader.jar savepassword -username John.Doe
```

Enter your password:

```
>
```

You are prompted to enter the password for the specified user name value. This password is masked so that it can't be viewed in the command window. You can then use the tool to submit or retrieve the status or log files for an import by only providing the user name value. This protects the password of the integration user by preventing other users from viewing the password either on the command line (by scrolling back through recently executed commands, viewing the password in the scheduling utility, or opening a configuration file containing the password value).

You can get the options for each command, by using the option `-h` for that command. For example, the following command lists the options available for the `submit` command.

```
> java -jar oscdataloader.jar submit -h
```

Use the Configuration File

The default configuration file is `oscdataloader.config` located in the `config` folder. This is used for all imports, unless otherwise mentioned. You can use another configuration file using the `-config` parameter.

```
> java -jar oscdataloader.jar listimports -config c:\test\configfile.txt
```

The configuration file should have all parameters, with each line of the file containing a key-value pair. For example:

```
import-name=Testing  
  
input-file=c:\\testing\\testing.csv  
  
mapping-number=888100111272708  
  
target-url=https://mypod.oracle.com  
  
object=Account  
  
username=john.doe
```

Note: You can save your password by setting the parameter `wallet=true` in the `oscdataloader.config` file.

How is geography data updated? Are updates available for all countries at the same time?

When you import the geography data for a country for the first time you would get the latest Loqate geography data. But if your Loqate geography data is more than three months old, you have to uptake the latest Loqate geography data by following the steps in the [Replace Existing Master Geography Data with Revised Oracle-Licensed Geography Data](#) topic.

Related Topics

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

How can I create a custom field and add it to CX Sales Mobile?

You can create a custom field and add it to the CX Sales Mobile application.

The configuration involves three major steps:

1. Create the custom field for the Sales application.

2. Make the field available in Adaptive Search.
3. Add the field to CX Sales Mobile UI using the CX Sales Mobile Composer tool in Application Composer.

Create the Custom Field

1. Enter a sandbox where Application Composer is an active tool
2. Open Application Composer.
For example, you can open Application Composer by selecting it from the sandbox **Tools** menu.
3. In the left pane, search for the object for which you want to create the field.
4. Expand the object node.
5. Click **Fields**.
6. In the Fields page, click **Create**.
7. On the Select Field Type window, select the type of field you are creating.
8. Enter the required information for the field. What you enter is different for each field type. For details, see the topic *Field Types and Field Properties*.
9. Make sure the **Include in Service Payload** check box is selected.
10. Click **Save and Close**.
11. Click on the sandbox name and select **Publish**.
12. On the Sandbox Details page, click **Publish** again.

Make the Field Available in Adaptive Search

Follow the instructions in the topic *Make Additional Fields Searchable*.

Add the Field to the CX Sales Mobile UI

Follow the instructions in the topic *Configure the App Using the Configuration Tool* and related topics in the Implementation Reference guide.

What are the roles required to import or export data?

You require certain duties and roles to perform activities related to import and export management. Oracle ships several OOTB roles with access to Import and Export data from CX Sales. You can select and use administrator level roles as needed.

You can get additional information about the duties and roles in the Security Reference for Sales and Fusion Service guide.

Enhanced Data Privacy

You can only view import and export jobs that you submitted. You can't view the import and export jobs and associated data files submitted by other users. However, you can still view import jobs as part of the management reporting hierarchy. Managers can view their directs' imports and exports.

Administrators can configure this by setting the profile option **ORA_ZCA_IMPEXP_RESTRICT_USERACCESS** to **Y** by navigating to **Setup and Maintenance > Search > Manage Administrator Profile Values task**. Search for the profile option code.

Roles for Import and Export

This table lists the set of roles required to import and export top-level objects. The values in brackets are the role codes. In the case of multiple roles listed, you need any one of the mentioned roles.

Note: You can import or export a child-level object if you have the role applicable to the parent object.

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
Access Groups	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)
Account	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Action	Internal Service Request Administrator (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR)
Action Plan	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR) Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION) HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR) Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION) HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION)
Activity	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Sales Manager (ORA_ZBS_SALES_MANAGER_JOB), Sales Representative (ORA_ZBS_SALES_REPRESENTATIVE_JOB), Channel Administrator (ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB), Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB), Channel Partner Portal Administrator (ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB) Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB),
Asset	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB),

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
		Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Attachments	FUSION_APPS_CRM_ESS_APPID, FUSION_APPS_CRM_ODI_APPID, FUSION_APPS_CRM_SOA_APPID, Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY) Sales Lead Processing (ORA_MKL_SALES_LEAD_PROCESSING_DUTY) Corporate Marketing Manager (ORA_MKT_CORPORATE_MARKETING_MANAGER_JOB) Marketing Analyst (ORA_MKT_MARKETING_ANALYST_JOB) Marketing Manager (ORA_MKT_MARKETING_MANAGER_JOB) Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB) Marketing VP (ORA_MKT_MARKETING_VP_JOB) Opportunity Administration (ORA_MOO_OPPORTUNITY_ADMINISTRATION_DUTY) Customer Contract Administrator (ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB) Customer Contract Manager (ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB) Enterprise Contract Administrator (ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB) Enterprise Contract Manager (ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB) Supplier Contract Administrator (ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB) Supplier Contract Manager (ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB) Subscription Specialist (ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB) Sales Catalog Administrator (ORA_QSC_SALES_CATALOG_ADMINISTRATOR_JOB) HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION) Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR)	Customer Contract Administrator(ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB), Opportunity Administration (ORA_MOO_OPPORTUNITY_ADMINISTRATION_DUTY) , Enterprise Contract Administrator (ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB), Supplier Contract Administrator (ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Administrator (ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB) Sales Manager (ORA_ZBS_SALES_MANAGER_JOB) Sales Representative (ORA_ZBS_SALES_REPRESENTATIVE_JOB) Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB) Channel Account Manager (ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB) Channel Administrator (ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB) Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB) Channel Partner Manager (ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB) Channel Partner Portal Administrator (ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB) Channel Sales Director (ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB) Channel Sales Manager (ORA_ZPM_CHANNEL_SALES_MANAGER_JOB) Sales Analyst (ORA_ZSP_SALES_ANALYST_JOB)	
Business Plan	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Campaign	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Case	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)
Classification Code	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
Competitor	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Consumer	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)
Contact	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Contract	Customer Contract Administrator (ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB), Customer Contract Manager (ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB), Enterprise Contract Administrator (ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB), Enterprise Contract Manager (ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB), Supplier Contract Administrator (ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB), Supplier Contract Manager (ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB)	Customer Contract Administrator (ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB), Customer Contract Manager (ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB), Enterprise Contract Administrator (ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB), Enterprise Contract Manager (ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB), Supplier Contract Administrator (ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB), Supplier Contract Manager (ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB)
Contests	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Country Structure	Geography Administration (ORA_GEO_ADMIN_DUTY)	Geography Administration (ORA_GEO_ADMIN_DUTY)
Custom Object	Custom Objects Administration (ORA_CRM_EXTN_ROLE), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Custom Objects Administration (ORA_CRM_EXTN_ROLE), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)
Deal Registration	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)
Duplicate Resolution Request	ORA_ZCH_DATA_STEWARD_MANAGER	ORA_ZCH_DATA_STEWARD_MANAGER
Event	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Event Team Member	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
Geography	Geography Administration (ORA_GEO_ADMIN_DUTY)	Geography Administration (ORA_GEO_ADMIN_DUTY)
Goals	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Hierarchy	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Hierarchy Member	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)
Household	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Hub Source System Reference	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)
Incentive Rule Assignments	Incentive Compensation Analyst (ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB), Incentive Compensation Integration Specialist (ORA_CN_INCENTIVE_COMPENSATION_INTEGRATION_SPECIALIST_JOB), Incentive Compensation Manager (ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB), Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)	Incentive Compensation Analyst (ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB), Incentive Compensation Integration Specialist (ORA_CN_INCENTIVE_COMPENSATION_INTEGRATION_SPECIALIST_JOB), Incentive Compensation Manager (ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB), Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)
Incentive Rule Attribute Values	Incentive Compensation Analyst (ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB), Incentive Compensation Integration Specialist (ORA_CN_INCENTIVE_COMPENSATION_INTEGRATION_SPECIALIST_JOB), Incentive Compensation Manager (ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB), Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)	Incentive Compensation Analyst (ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB), Incentive Compensation Integration Specialist (ORA_CN_INCENTIVE_COMPENSATION_INTEGRATION_SPECIALIST_JOB), Incentive Compensation Manager (ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB), Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)
Incentive Rules	Incentive Compensation Analyst (ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB), Incentive Compensation	Incentive Compensation Analyst (ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB), Incentive Compensation

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
	Integration Specialist (ORA_CN_INCENTIVE_COMPENSATION_INTEGRATION_SPECIALIST_JOB), Incentive Compensation Manager (ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB), Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)	Integration Specialist (ORA_CN_INCENTIVE_COMPENSATION_INTEGRATION_SPECIALIST_JOB), Incentive Compensation Manager (ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB), Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)
Incentive Transaction	Incentive Compensation Analyst (ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB), Incentive Compensation Integration Specialist (ORA_CN_INCENTIVE_COMPENSATION_INTEGRATION_SPECIALIST_JOB), Incentive Compensation Manager (ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB), Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)	Incentive Compensation Plan Administrator (ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)
Interaction	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)
Kpi	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
MDF Budget	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB), Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)
MDF Claim	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB), Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)
MDF Request	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB), Marketing Operations	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
	Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB)	
Note	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Sales Manager (ORA_ZBS_SALES_MANAGER_JOB), Sales Representative (ORA_ZBS_SALES_REPRESENTATIVE_JOB), Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB), FUSION_APPS_CRM_ESS_APPID, FUSION_APPS_CRM_ODI_APPID, FUSION_APPS_CRM_SOA_APPID	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)
Objective	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Opportunity	Opportunity Administration (ORA_MOO_OPPORTUNITY_ADMINISTRATION_DUTY), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), FUSION_APPS_CRM_ESS_APPID, FUSION_APPS_CRM_ODI_APPID, FUSION_APPS_CRM_SOA_APPID	Opportunity Administration (ORA_MOO_OPPORTUNITY_ADMINISTRATION_DUTY), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Organization	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Partner	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)
Partner Programs	Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)	Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)
Person	Trading Community Import Batch Management (ORA_MANAGE_TRADING_COMMUNITY_IMPORT_BATCH_DUTY)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Price Book Header	Sales Administrator (ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ZBS_SALES_ADMINISTRATOR_JOB)
Product	Sales Administrator (ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ZBS_SALES_ADMINISTRATOR_JOB)
Product Group	Sales Catalog Administrator (ORA_QSC_SALES_CATALOG_ADMINISTRATOR_JOB),	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	
Program Enrollments	Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)	Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB)
Promotion	Loyalty Program Administrator (ORA_LOY_LOYALTY_PROGRAM_ADMINISTRATOR_JOB)	Loyalty Program Administrator (ORA_LOY_LOYALTY_PROGRAM_ADMINISTRATOR_JOB)
Queue	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration(ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration(ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)
Quote and Order	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Resource	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
Resource Capacity	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration(ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration(ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)
Sales Lead	Marketing Analyst (ORA_MKT_MARKETING_ANALYST_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Marketing Manager (ORA_MKT_MARKETING_MANAGER_JOB), Sales Lead Processing (ORA_MKL_SALES_LEAD_PROCESSING_DUTY), Marketing Operations Manager (ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB), Corporate Marketing Manager (ORA_MKT_CORPORATE_MARKETING_MANAGER_JOB), Marketing VP (ORA_MKT_MARKETING_VP_JOB), Sales Analyst (ORA_ZSP_SALES_ANALYST_JOB), FUSION_APPS_CRM_ODI_APPID, FUSION_APPS_CRM_SOA_APPID, FUSION_APPS_CRM_ESS_APPID	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Sales Lead Processing (ORA_MKL_SALES_LEAD_PROCESSING_DUTY)
Sales Territory	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Territory Management Administration (ORA_MOT_TERRITORY_MANAGEMENT_ADMINISTRATION_DUTY), Sales Manager (ORA_ZBS_SALES_MANAGER_	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Territory Management Administration (ORA_MOT_TERRITORY_MANAGEMENT_ADMINISTRATION_DUTY)

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
	JOB), Sales Restricted User (ORA_ZBS_SALES_RESTRICTED_USER_JOB), Sales VP (ORA_ZBS_SALES_VP_JOB), Channel Account Manager (ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB), Channel Partner Manager (ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB), Channel Sales Director (ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB), Channel Sales Manager (ORA_ZPM_CHANNEL_SALES_MANAGER_JOB), FUSION_APPS_OBIA_BIEE_APPID, FUSION_APPS_CRM_ESS_APPID, FUSION_APPS_CRM_ADF_BI_APPID	
Sales Territory Quota	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Territory Management Administration (ORA_MOT_TERRITORY_MANAGEMENT_ADMINISTRATION_DUTY), Sales Manager (ORA_ZBS_SALES_MANAGER_JOB), Sales Restricted User (ORA_ZBS_SALES_RESTRICTED_USER_JOB), Sales VP (ORA_ZBS_SALES_VP_JOB), Channel Account Manager (ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB), Channel Operations Manager (ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB), Channel Partner Manager (ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB), Channel Sales Director (ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB), Channel Sales Manager (ORA_ZPM_CHANNEL_SALES_MANAGER_JOB)	Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB), Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB), Territory Management Administration (ORA_MOT_TERRITORY_MANAGEMENT_ADMINISTRATION_DUTY)
Self Service Role	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR)
Service Request	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT), HR Help Desk Analysis (ORA_SVC_HELPDESK_ANALYSIS), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT)
Standard Text	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT), HR Help Desk Analysis (ORA_SVC_HELPDESK_ANALYSIS), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION), Internal Service Request Analysis (ORA_SVC_	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
	INTERNAL_HELPDESK_ANALYSIS), Internal Service Request Management (ORA_SVC_INTERNAL_HELPDESK_SR_MANAGEMENT), Service Request Channel User (ORA_SVC_SR_CHANNEL_USER), Service Request Power User (ORA_SVC_SR_POWER_USER), Service Request Troubleshooter (ORA_SVC_SR_TROUBLESHOOTER)	
Standard Text Folder	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT), HR Help Desk Analysis (ORA_SVC_HELPDESK_ANALYSIS), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION), Internal Service Request Analysis (ORA_SVC_INTERNAL_HELPDESK_ANALYSIS), Internal Service Request Management (ORA_SVC_INTERNAL_HELPDESK_SR_MANAGEMENT), Service Request Channel User (ORA_SVC_SR_CHANNEL_USER), Service Request Power User (ORA_SVC_SR_POWER_USER), Service Request Troubleshooter (ORA_SVC_SR_TROUBLESHOOTER)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)
Standard Text User Variables	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT), HR Help Desk Analysis (ORA_SVC_HELPDESK_ANALYSIS), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION), Internal Service Request Analysis (ORA_SVC_INTERNAL_HELPDESK_ANALYSIS), Internal Service Request Management (ORA_SVC_INTERNAL_HELPDESK_SR_MANAGEMENT), Service Request Channel User (ORA_SVC_SR_CHANNEL_USER), Service Request Power User (ORA_SVC_SR_POWER_USER), Service Request Troubleshooter (ORA_SVC_SR_TROUBLESHOOTER)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Service Request Management (ORA_SVC_HELPDESK_SR_MANAGEMENT), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)
Subscription	Subscription Specialist (ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB)	Subscription Specialist (ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB)
Subscription Service Charge Mappings	Subscription Specialist (ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB)	Subscription Specialist (ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB)
Subscription Usage Event	Subscription Specialist (ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB)	Subscription Specialist (ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB)

Object Name	Recommended Role for Import and Export (Code)	Administrator Level Roles (Code)
Template	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)	Service Request Administrator (ORA_SVC_SR_ADMINISTRATOR), HR Help Desk Administration (ORA_SVC_HELPDESK_ADMINISTRATION), Internal Service Request Administration (ORA_SVC_INTERNAL_HELPDESK_ADMINISTRATION)
Territory Geographies	Geography Administration (ORA_GEO_ADMIN_DUTY)	Geography Administration (ORA_GEO_ADMIN_DUTY)
Vehicles	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)	Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)

Related Topics

- [Schedule the Send Pending LDAP Requests Process](#)

Why is Import Geography Data Disabled in Manage Geographies?

Import Geography Data is disabled for a country if the geography data for that country isn't available from Loqate or if the geography structure or hierarchy is already defined for that country.

The existing master geography hierarchy can be from Loqate or non-Loqate geography data providers. For example, Pakistan isn't supported currently in the supported list of 82 countries. If you try to import geography data for Pakistan after defining geography structure or geography hierarchy for it, Pakistan would be grayed out in the import list.

Note: If the hierarchy is defined, delete the geography hierarchy data first and then the geography structure.

How do I import geographies?

You can import geographies using either Oracle-licensed geography reference data or Import Management.

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

Oracle-Licensed Geography Reference Data

You can import Oracle-licensed data from Loqate, for those countries where the data is available. For more information about the supported countries, see the List of Available Countries with Loqate Geography Reference Data topic. You

can import geography data using the **Manage Geographies** task. Search for the country, and select **Import Geography Data** from the **Actions** menu. If the licensed data isn't available or already set up for a particular country, then the **Import Geography Data** action is disabled.

Note:

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

Import Management

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

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

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

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

Related Topics

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

How do enable the filtering of visualizations by team members?

To filter data by the different team members in saved searches and their visualizations, you must enable the Team Members attribute for the Group By feature in Adaptive Search. You can then use the Team Members field to group data in your search and the resulting visualization. Suppose, for example, that a bar chart in the Sales Dashboard shows performance for different team members. Enabling the attribute, makes it possible to click one of the bars to view the performance just for that team member.

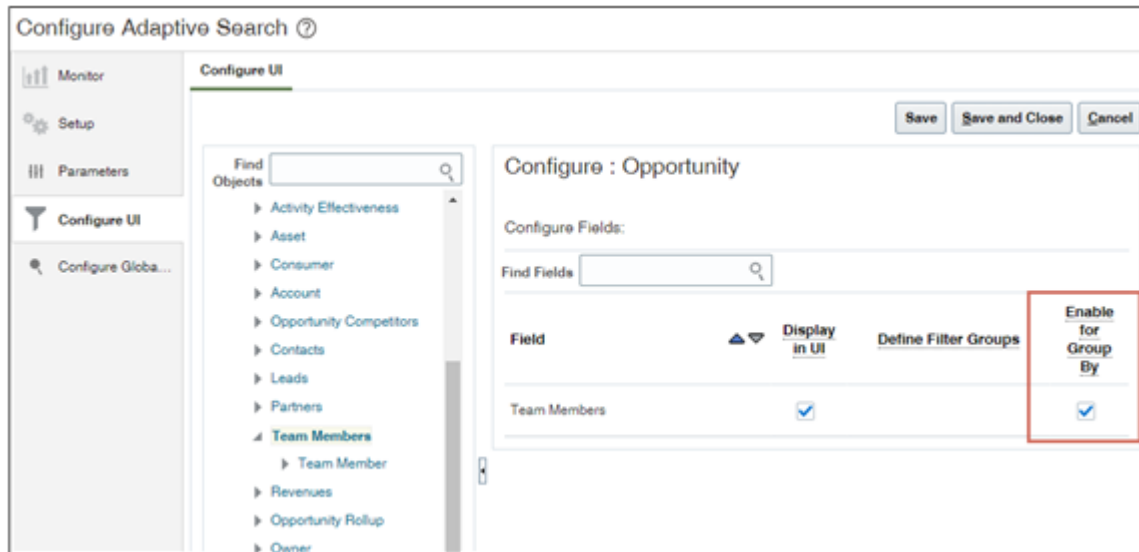
Enable the Group By Feature

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance**.
2. In the Setup and Maintenance work area, open the **Configure Adaptive Search** task.
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o Task: Configure Adaptive Search
3. On the **Configure Adaptive Search** page, click the **Parameters** tab.
4. Highlight the **Enable Group By** and click **Edit**.
5. In the Warning message, click **Yes**.
6. In the **Current Value** field, change the value from N to Y and click **Save and Close**.

Enable Team Member Fields for Group By

1. Sign in as a setup user.
2. Navigate to the Setup and Maintenance work area, and open the Configure Adaptive Search task:
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o Show: All Tasks
 - o Task: Configure Adaptive Search
3. On the Configure Adaptive Search page, click the **Configure UI** tab.

4. Select the object you want to set up for your Group By in the left pane of the tab and open the object hierarchy to locate Team Members and Team Member.



5. Select the **Enable for Group By** option for both Team Members and Team Member fields.

Note: Ensure that the **Display in UI** option is also selected

6. Click **Save and Close**.
7. Sign out and then sign in again to see your changes.

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.

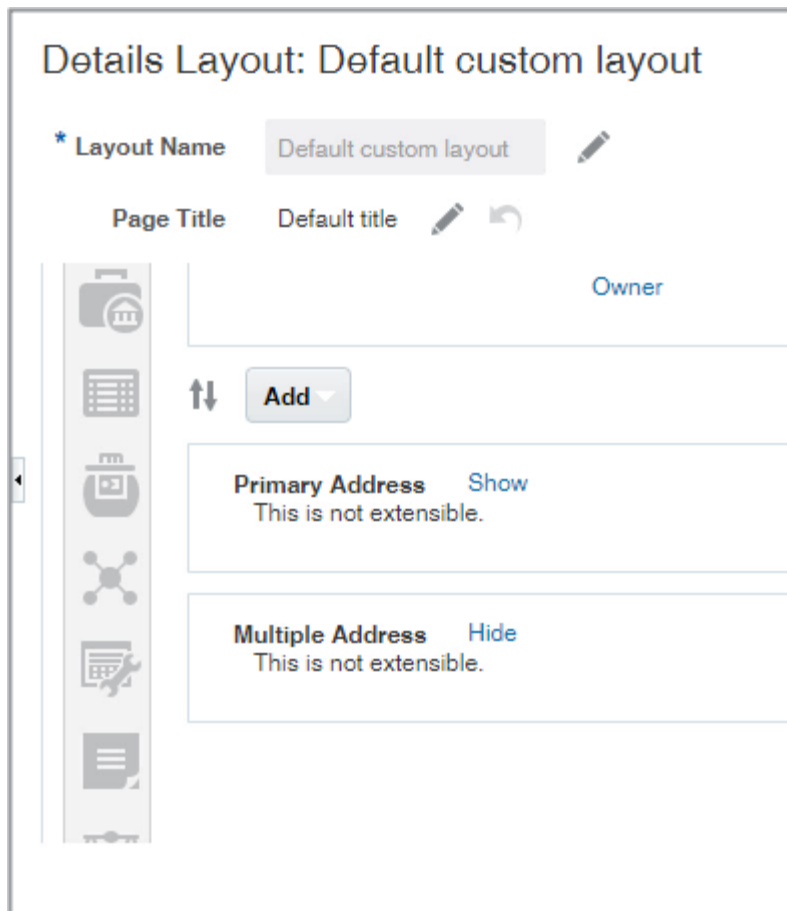
Display Multiple Addresses on the Account Profile Tab

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**.

How do I set up the "What's Around Me?" maps feature?

Salespeople can access the "What's Around Me?" map feature directly from the CX Sales Mobile home page. The application maps the salesperson's location using phone location, displaying nearby leads, accounts, contacts, and opportunities.

How It Works

To display the map, the phone uses the phone's default map. Records display as pins on the map, with icons that distinguish the record type. Tapping a pin displays a card showing record details and the actions that salespeople can do next, such as opening a contact record.

The card's **Get Directions** button uses the phone's native map application to guide salespeople to their destinations. Actions such as **Contact**, **Edit**, and **Convert Lead** are available directly from the cards, meaning that salespeople remain in context when acting on the information that's presented on the map.

Note: Records with addresses in China, Japan, and South Korea aren't geocoded or shown on maps.

Run Scheduled Processes to Enable

The map feature is enabled in the app by default. But, you must run or schedule processes. Here's how you run the scheduled processes:

Prerequisite: Enable geocoding for a country using the steps in [Set Up Geocoding](#).

1. Sign into Sales as a user with a Sales Administrator role.
2. Navigate to **Tools > Scheduled Processes**.

3. In the Overview page, click **Actions** > **Schedule New Process**.
4. Click the **Name** list button and search for the **Populate Location Latitude and Longitude Information** process, and then click **OK**. This process populates the latitude and longitude information for every sales object except Leads, which is handled by a different process, as described later in this procedure.
5. Enter the parameters, such as the start date and end date, and schedule the job to run automatically at specified intervals.
6. Click **Submit**.
7. Carry out the relevant steps again. This time search for **Populate Lead Latitude and Longitude Information**. This process populates the latitude and longitude information for leads.

Optionally Enable Saved Search Filters

You can use Workspace saved searches to filter the sales objects that are near a salesperson's location. If you want to enable this filter, follow the steps in the [Enable Salespeople to View Saved Search Results on a Map](#) topic.

Related Topics

- [Set Up Geocoding](#)

Why is my Adaptive Search publish process taking time to complete?

The Publish process publishes the Adaptive Search configuration you set up in the Quick Setup and Advanced Setup UIs. You must click Publish to run the process each time you make changes on the Setup tab. Your changes become effective when the process completes.

The variations in the time it takes for the successful completion of the publish process is mainly due to the volume of data, the number of objects enabled, and the number of attributes selected for each object.

For example, if you publish more attributes and more objects, then it takes more time to complete the publish and indexing process. You can improve the performance by removing any attributes that you don't want to be indexed. You can also monitor the progress of the publish process. Your configuration is live when the process completes successfully.

Note: The Publish process should be completed before running the Periodic refresh process.

Can I modify or translate saved searches using the User Interface Text tool?

No. You can't use the User Interface Text tool to modify or translate predefined Workspace saved searches. However, you can select Manage Saved Searches to create a copy of the saved search and rename it to suit your business requirements.

If you translate the text, ensure you use the current language of the assigned users of the saved search.

Is there a limit on the number of products you can include in a sales catalog product group?

No, there's no specific limit on the number of products you can have in a product group.

How can I fix an invalid relationship error when converting leads?

If you try to convert a lead that contains an invalid contact relationship, you may receive an invalid relationship error during the conversion.

For example, you create a lead with a valid active primary contact and account. An issue might arise when you go to convert the lead if an incorrect relationship exists for a second contact on the lead. In such a scenario, you must deactivate the relationship and after some time try to convert the lead again.

However if you want the association of the lead and contact to remain, you must add the contact back on the lead through the **Contacts** tab on the **Edit Lead** page. Here's how to resolve the issue:

1. Navigate to the **Edit Lead** page.
2. In the **Contacts** tab, remove the second (nonprimary) contact.
3. Click **Save**.
4. Add the contact that you just removed back again to the lead.
5. Click **Save**.
6. Convert the lead.

How can I remove the standard buttons on the Account Activities page in Sales?

To customize the Account Activities page in the classic Sales UI, use Application Composer. For example, you can remove standard buttons, such as the Create Appointment, Create Task, and Log a Call buttons. Here's how.

Customize the Account Activities Page

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

1. In the Navigator, click **Configuration > Sandboxes**.
2. Click **Create Sandbox**.
3. Enter a sandbox name.
4. Select **Active** for **Application Composer**.

5. Click **Create and Enter**.
6. From the sandbox **Tools** menu, select **Application Composer** to enter the tool.

Make a Copy of the Standard Layout

While in Application Composer, make a copy of the standard layout:

1. Open the **Standard Objects** node on the left panel.
Open the **Activity** node.
2. Click **Pages**
3. On the Activity Pages tab, scroll down to the **Embedded Activity Summary Layout** section.
4. Select **Standard Layout** for Embedded Task List Overview and click **Duplicate**.
5. In the Duplicate Layout window, enter a new name for your layout or just click **Save and Edit**.
6. Drill down into your layout.
7. Next to Embedded Task List Overview Table, click **Edit** (the pencil icon).
8. Scroll down until you see the **Configure Detail Form: Buttons and Actions**.
9. You can remove the Create Appointment, Create Task, and Log a Call buttons by moving them from the Selected Buttons to the Available Buttons list.
10. Click **Save and Close**.
11. Click **Done**.

Publish Your Sandbox

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

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 can I configure and extend application pages for territories?

Using Application Composer, you can modify many items that appear on the application pages for sales territories.

Use Application Composer to modify these pages:

- Territories landing page
- Create Territories page
- Details page (see a discussion of subtabs in the Details page section)

Make changes such as these examples:

- Hide or show standard fields.
- Set fields as required.
- Set field default values.
- Reorder columns.
- Change column labels.
- Add custom fields (all types).

Note: To extend the application pages for territories, use the Sales Territory object in Application Composer.

Territories Landing Page

You can modify the Territories landing page. For example, you can hide standard fields or show custom fields.

1. Navigate to the Sales Territory object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, under Landing Page Layouts, duplicate the standard layout to create a new layout.

Create Territories Page

You can modify the Create Territories page. For example, you can hide standard fields, make a field required, add a default value, and show custom fields.

1. Navigate to the Sales Territory object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, under Creation Page Layouts, duplicate the standard layout to create a new layout.

To enhance run time usability for your end users, optionally group custom fields into field groups.

Details Page

The Details page consists of multiple subtabs that display along the side of the page. You can modify most of these subtabs. You can also add subtabs to display records from child or related objects, for example.

To add custom fields to certain subtabs available from the Details page, you must first navigate to those subtab target objects in Application Composer to create the fields. After creating the fields on the target object, you can then navigate back to the desired details page layout for the Sales Territory object to add those fields to the specific subtabs.

1. Navigate to the Sales Territory object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, under Details Page Layouts, duplicate the standard layout to create a new layout.
4. When making changes to the Details page, select the subtab you want to change first. These subtabs are available from the Details page. Use the subtabs to configure which standard and custom fields display at run time. You can also add a new tab.
 - Summary
This tab isn't extensible.
 - Dimensions
This tab isn't extensible.
 - Inclusions
This tab isn't extensible.
 - Exclusions
This tab isn't extensible.
 - Team Members
Use the Sales Territory Resource object to create custom fields as needed.
 - Child Territories
Use the Sales Territory object to create custom fields as needed.

Custom Territory Attributes

Assign territories using the custom territory attributes. For example, if your organization want to track revenue by different groups of salespeople within their territories - one group to focus on new customers while another group for subscription renewals. Create custom territory attributes to track revenue from both the groups separately. This means that the records are matched with the revenue, based on a new territory or a renewal territory.

How do I enable import of custom objects?

This topic describes how to enable the import of custom objects. Before you can import and export data for custom objects created with Application Composer, you must ensure that the required object artifacts have been generated.

Object artifacts are required to register your extensions and make them available for importing. When you publish your sandbox after your configurations, artifacts are automatically generated and the custom objects are available for import and export. With a single publishing, you can generate configurations for CRM, ERP, and SCM cloud applications.

How you Enable Import of Custom Objects

To enable the import of custom object data:

1. Create a sandbox and add configurations to the objects.
2. Publish the sandbox. See [Publish Sandboxes](#) for more information.
3. Artifact generation is triggered automatically as part of the sandbox publish. Artifacts are generated for objects that are changed inside sandbox only.
4. You can monitor the artifact generation status on the Generate Import and Export Artifacts tab by navigating to **Tools > Import Management > Import Configuration**. You can perform this only once you're outside the sandbox.

After the artifact is generated, you're ready to import. If some artifacts aren't generated automatically, then you have to manually generate them using the **Generate** button. See [How do I generate artifacts manually?](#).

To download the diagnostics log of the artifact generation, click the **Generate** button under the **Diagnostics** tab, and then click the link under the **Attachments** column. Note that you must import the custom child objects only after importing the parent object.

Note: If your custom field is missing from import mapping after generating the artifacts, then enable the profile option `ORA_ZCA_OBJECT_METADATA_COMPLETE_GENERATION` to 'Yes' from **Setup and Maintenance > Manage Administrator Profile Values**. Then generate your artifacts again and turn the profile option back to "No".

You can update the profile option `ORA_ZCA_IMPORT_EXPORT_QUEUE_SIZE` to specify the size of import and export queues for dynamic queue configurations. The possible values are LOW, MEDIUM, HIGH, and FIXED. After updating the profile option, you must generate the artifacts for the changes to reflect.

If you have configured security in the Application Composer for create, update, or delete scenario, then such validations aren't honored by high-volume imports. Validations are applicable only for low-volume imports.

Relationships Between Custom Objects

Parent object resources expose the child objects of top-level custom objects. For objects to interact with one another, relationships must be created between them. The related objects can be either standard or custom objects. For example, if you want attributes from the Employee object to be available in the Trouble Ticket object workspace, a relationship must be defined between the Employee object and the Trouble Ticket object.

You can use Application Composer to create relationships between objects. Using Application Composer, you can create two types of relationships:

- Parent-child: When you define a parent-child relationship, the link to the child object is included in the parent object description. A child object doesn't have its own workspace, and the child object's records are deleted if the parent object record is deleted.
- Reference: When you define a reference relationship, the primary key of the source object is included as a foreign key in the description of the target object.

Intersection Objects

Use Application Composer to create many-to-many relationships between custom objects. In this case, you create an intersection object that references the source and target objects. For example, consider two object resources,

Trouble Ticket and Resource, related by a many-to-many reference relationship, with the Assignment resource as the intersection object. In such a case, the following applies:

- The Assignment resource has Trouble Ticket as the source object and Resources as the target object. The objects Trouble Ticket and Resources have many-to-many relationships.
- The Assignment resource is the child resource of both Trouble Ticket and Resources.

How you Import Record Name Values

By default, the Record Name field is automatically generated and is updated using automatic sequence. The value you provide in the source file is ignored. If automatic record-name generation is disabled in the Application Composer, then you must provide the value in the source file and this value is imported. However, high-volume import doesn't support automatic generation of Record Name field; you must provide the Record Name value in the source file.

Specify the RecordNumber Attribute

When defining your custom object in Application Composer, RecordNumber field is always unique. The import activity uses RecordNumber as the user key to resolve the record in the target database.

When you modify the PUID (**RecordNumber**) make sure you follow by Application Composer guidelines, to prevent recordNumber collisions with the existing database sequence. This is applicable for both high-volume import and import using REST service. For more information on how to prevent conflict in PUID, see the topic Custom Object Public Unique IDs in the related topics section.

Support of Record Name Attribute

You can update custom object records by using the Record Name attribute to identify records. To enable this, you must set the profile option `ORA_ZCA_IMPORT_ENABLE_RECORDNAME_SUPPORT` to Y. By default this profile option has a value N. If you use the Record Name attribute to update records, the following order of precedence is used to identify the records:

1. ID (PK)
2. RecordNumber (PUID)
3. RecordName (**AlternatePUID**)

However, you can't update the `Recordname` attribute value.

Related Topics

- [Publish Sandboxes](#)

How do I import resource data?

You can use import management to create or update resource records.

To import resource records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.
- Use the Manage Business Unit task to set up appropriate business units.
- Use the Manage Legal Entity task to set up appropriate legal entities .
- Use the Manage Resource Roles task to define resource roles. Sales Administrator role is required to load the resource data.

Select a Unique Identifier for Your Records

To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.

The preferred option to uniquely identify an object record is through the public unique identifier. If you're creating new records, then you can provide a user-friendly public unique identifier (Party Number). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the resource object, the attribute is ResourcePartyNumber.

Required Attributes and Validations for the Resource Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes. When you create a new resource, associated employee records are also created. For more information about creating resources for existing employee records, see the topic "Example of Adding Resource Profile to Existing Employees". The following table lists the required attributes for importing new resource records, required attributes for updating resource records, prerequisite setup tasks for the attributes, and specific validations, if any, for resource import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Resource Record	Updating an Existing Resource Record
FirstName	The first name of the resource.	No validation	Required	Pass the party number as the key.

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Resource Record	Updating an Existing Resource Record
LastName	The last name of the resource.	No validation	Required	Pass the party number as the key.
BusinessUnit	The name of the business unit associated with the resource.	It should be a valid existing value.	Required	Not updatable
LegalEntity	The name of the legal entity associated with the resource.	It should be a valid existing value.	Required	Not updatable
ResourcePartyNumber	The public unique identifier (PUID) of the resource party. This is also known as Registry Id.	This should be unique.	Conditionally required This is auto-generated. However, you can provide a value to replace the auto-generated value when creating the resource record.	Required
ResourceEmail	The email address of the resource	The email address must be unique. Specify the email Id when creating the resource.	Required	Pass the party number as the key.
IndividualRoleCode	The code that represents the resource role assigned to the resource.	A resource can have only one individual role code assigned for a given date range. You define and review resource role types and codes using the Manage Resource Roles task.	Conditionally required A value is required when creating a standalone resource.	Pass the party number as the key.
Username	The user account name of the resource used to login to the application.	The user name has to be unique.	Optional	Not Updatable
ResourceOrgRoleCode	The code indicating the role of the resource in association with organization membership. For example, SALES_REPRESENTATIVE, SALES_MANAGER, and so on.	One organization membership role is allowed for a given date range.	Conditionally required A value is required when creating a resource as a part of the resource hierarchy.	Pass the party number as the key.
RawWorkPhoneNumber	The work phone number of the resource	No validation	Optional	Optional
WorkPhoneCountryCode	The work phone country code of the resource	Enter a value when you specify the RawWorkPhoneNumber.	Conditionally required	Conditionally required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Resource Record	Updating an Existing Resource Record
		Note: When providing a value for the RawWorkPhoneNumber, ensure that you also provide a value for the WorkPhoneCountryCode. If you don't enter a valid WorkPhoneCountryCode, the format of the RawWorkPhoneNumber will be inaccurate.	A value is required when you provide the RawWorkPhoneNumber.	A value is required when you provide the RawWorkPhoneNumber.
RawMobilePhoneNumber	The mobile phone number of the resource	No validation	Optional	Optional
MobilePhoneCountryCode	The mobile phone country code of the resource	Enter a value when you specify the RawMobilePhoneNumber.	Conditionally required A value is required when you provide the RawMobilePhoneNumber.	Conditionally required A value is required when you provide the RawMobilePhoneNumber.
RawFaxNumber	The fax number of the resource	No validation	Optional	Optional
FaxCountryCode	The fax country code of the resource	Enter a value when you specify the RawFaxNumber.	Conditionally required A value is required when you provide the RawFaxNumber.	Conditionally required A value is required when you provide the RawFaxNumber.

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

The following role codes are now available in Import Management.

- ResourceOrgRoleCode - Specifies the role that the resource plays as part of the hierarchy in the organization.
- IndividualRoleCode - Specifies the role assigned to the individual resources. You can also assign additional roles to the resource in the hierarchy to provide additional privileges to the resource.

You should not use a Resource Users import in Import Management or REST on an environment with full blown HCM Services implementation. In such cases, Import Management or REST must be used only to convert existing HR workers as resources. This is because, Resource Users REST API only supports vary basic attributes of the HR person/worker. It doesn't support Oracle Human Capital Management (HCM) custom attributes defined on HR Person/Worker.

Note:

- To identify a party number for a resource, you may use File Export, Resource User REST, or resource directory user interface.

For more information about exporting data, see the topic "Export Data" in the "Related Topics" section.

- In File-based Data Import, resource can be imported to load (create/update) HR workers (Employees and Contingent Workers) without any resource related attributes. However, this isn't possible in Import Management.
- You can't create a standalone worker using this feature. To create a standalone worker, use the HCM Data Loader. For more information about creating a standalone worker, see the Oracle Global Human Resources Cloud Getting Started with Your HR Implementation guide.
- 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, and automatically populate constant values. After you enter your data, click a button in the macro to import data. Download the Excel macros from the Oracle Sales: Getting Started with Your Sales Implementation: Import Macros (Document ID 2229503.1) article on My Oracle Support.
- Loading of only worker attributes isn't supported.
- Resource Team memberships aren't supported.
- Automatic re-parenting of the child organizations or direct employees when a manager leaves the resource organization isn't supported.
- Move all reporting resources and child organizations to a different organization, when the organization membership of the current manager is ended either due to the movement of the manager to a different organization or the termination of the manager.

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

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

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

You must run the following scheduled processes after creating or updating a resource:

1. **Reporting Hierarchy Generation:** This job updates the reporting hierarchy in accordance with the changes in internal resource hierarchy. The resource's reporting manager isn't updated unless you run this scheduled process. Run this scheduled process after you make any changes to the hierarchy such as changing the manager or the organization.
For more information about the **Reporting Hierarchy Generation** scheduled process, see the section "Reporting Hierarchy Generation" in the *Understanding Scheduled Processes* guide.
2. **Update Person Search Keywords:** The After Batch Load parameter should be set to Y before you run the update person search keywords schedule process. If you run this scheduled process, you can search the person in the Manage Users UI. The application searches for keyword values in these attributes of a person's records such as person name, user name, primary email, primary phone, work location, and so on. Run this scheduled process when you create a new resource.

For more information about updating person search keywords, see the section "How You Update Person Search Keywords" in the *Oracle Talent Management Cloud Implementing Talent Management Base* guide.

3. **Send Pending LDAP Requests:** This job processes the pending LDAP requests to provision the user accounts and roles. You can specify the parameters User Type and Batch Size with this job. You must specify User Type (usually select All); if you leave it as blank, then this process won't process any requests. If you don't set Batch Size, the default will be A for automatic, which is 1/10th of the total requests number. You can specify a number for batch size to instruct the process to group that number of requests together for single batch process. If you want the process to pick up the FAULTED requests from previous run, you can set Batch Size as AF. Run this scheduled process when you create a new resource along with the user account.
4. **Synchronize User GUID:** This job synchronizes the user GUID of users including employees and contingent workers.

For more information about the **Synchronize User GUID** scheduled process, see the section "Synchronize User GUID" in the *Understanding Scheduled Processes* guide.

Related Topics

- [How do I export data?](#)
- [How do I import data?](#)
- [How do I generate the resource reporting hierarchy?](#)
- [How do I synchronize the GUID of users?](#)
- [Schedule the Send Pending LDAP Requests Process](#)

How do I import sales team member data?

You can use Import Management to create or update sales team member records.

You can import sales team member records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the sales team member data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import sales team member data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the sales team member import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.

- Ensure that you don't insert duplicate sales team member while importing, to avoid redundant data.

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records. Also ensure that the parent records, such as accounts, are in active status.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- **Public unique identifiers:** If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- **Source system and source system reference:** Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Sales Team Members or are updating Sales Team Members that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Sales Team Member Object

To import data successfully into Oracle Applications Cloud, your .CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

This table lists the required attributes for sales team member records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Team Member record	Updating an Existing Sales Team Member record	Delete an Existing Sales Team Member record
TeamMemberId	Sales Team Member ID. This is the primary key.	N/A	N/A	If available, provide this to update other attributes.	Required
SalesProfileID	Sales Profile ID	Active SalesProfileID to have been created already.	Conditionally required To be provided if none of the following are available: • PartyID • PartyNumber • Combination of PartySourceSystem and PartySourceSystem	Conditionally required To be provided if TeamMemberID isn't available. To be provided along with ResourceID or ResourcePartyNumber or ResourceEmailAddress.	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Team Member record	Updating an Existing Sales Team Member record	Delete an Existing Sales Team Member record
PartyID	Sales Account ID	N/A	Conditionally required To be provided if SalesProfileID isn't available.	Conditionally required To be provided if TeamMemberID or SalesProfileID isn't available. To be provided along with ResourceID or ResourcePartyNumber or ResourceEmailAddress.	Not Required
PartySourceSystem	Party source system of the Sales account	N/A	Conditionally required To be provided if SalesProfileID isn't available. To be provided along with PartySourceSystemReference.	Conditionally required To be provided if TeamMemberID or SalesProfileID or PartyID isn't available. To be provided along with ResourceID or ResourcePartyNumber or ResourceEmailAddress.	Not Required
PartySourceSystemReference	Party source system reference of the Sales account	N/A	Conditionally required To be provided if SalesProfileID isn't available. To be provided with PartySourceSystem.	Conditionally required To be provided if TeamMemberID or SalesProfileID or PartyID isn't available. To be provided along with ResourceID or ResourcePartyNumber or ResourceEmailAddress.	Not Required
PartyNumber	Party number of the sales account/PUID	N/A	Conditionally required To be provided if SalesProfileID isn't available	Conditionally required To be provided if TeamMemberID or SalesProfileID or PartyID isn't available. To be provided along with ResourceID or ResourcePartyNumber or ResourceEmailAddress.	Not Required
ResourceID	Resource identifier	Active ResourceID to have been created already.	Conditionally required To be provided if ResourcePartyNumber or ResourceEmailAddress isn't available.	Conditionally required To be provided if TeamMemberID isn't available. To be provided along with SalesProfileID or PartyID or PartyNumber or	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Team Member record	Updating an Existing Sales Team Member record	Delete an Existing Sales Team Member record
				PartySourceSystem along with PartySourceSystemRef	
ResourcePartyNumber	Resource party number/PUID	N/A	Conditionally required To be provided if ResourceID isn't available.	Conditionally required To be provided if TeamMemberID or ResourceID isn't available. To be provided along with SalesProfileID or PartyID or PartyNumber or PartySourceSystem along with PartySourceSystemRef	Not Required
ResourceEmailAddress	Resource email address	N/A	Conditionally required To be provided if ResourceID isn't available	Conditionally required To be provided if TeamMemberID or ResourceID or ResourcePartyNumber isn't available. To be provided along with SalesProfileID or PartyID or PartyNumber or PartySourceSystem along with PartySourceSystemRef	Not Required

Go to **Navigator > Tools > Import Management > Import Objects**, to see all the attributes of the sales team member object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

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

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

Related Topics

- [How You Use Alternate Keys to Import Records](#)
- [Potential Issues When Opening CSV Files in Excel](#)

How do I import data?

Use Import Management from the Tools work area, to import data from text files. This topic is your guide to importing data in sales, service, and incentive compensation.

You can create, update, or delete records through import.

The import options and other details differ by the type of data that you're importing. Before importing, understand how the data in your file maps to the attributes in Oracle Applications Cloud and what values are expected in the import file. The data records in the CSV source file may not be processed in the listed order. To learn how to monitor the status of your import, see the topic How You Monitor Your Import Activities in the Related Topics section.

Note: Don't submit duplicate import jobs for the same import object as they create duplicate object records.

To help you get started, you can use the example import object templates described in the related topics.

Import Data from a File

To import data:

1. Click **Tools > Import Management**.
2. On the **Manage Imports** page, click the **Create Import Activity** button.
3. On the **Enter Import Options** page provide values for each field as shown in the following table:

Field	Description of the value
Name	Name of the import.
Object	Object that you're importing. If you can't find your object, then search for it by clicking the Search link. In the Search and Select dialog box, enter the object name in the Object text box and click the Search button. Select your object from the result list and click OK. You can also use the advanced search option by clicking the Advanced button. Here you can search based on various filter criteria such as object name, Attachment supported, creation date, and so on. If the object you're importing isn't listed then verify if you have the roles and privileges required to import the object. For information on the roles, see the topic Roles Required for Import and Export Management referenced in the Related Topics section.
Attachment Object	To import an attachment for an existing object record in the database select the Attachments object from the Object drop-down list. Next select the object from the Attachment Object drop-down list. For more details on importing attachments, review the topic Import Attachments.
File Name	Browse and select a text file in CSV format. The first row of the source file is treated as the header row. Provide a file name within 40 characters. Note: If your source file has more than 50,000 records, then you must manually split the file into several smaller files with less than 50,000 records each. The file import page only permits 50,000 records for each import job. Alternatively, you can use the External Cloud Data Loader Client, which can accept files with more than 50,000 records. See the My Oracle Support (support.oracle.com) document External Data Loader Client (document ID 2325249.1) for more information about this tool.
Import Object Hierarchy	To import a hierarchy of objects, such as child and grandchild objects, click on the Import Object Hierarchy link after you upload the source file for the parent object. Next select the Enabled check box for the child object you want to import, and select the related source file.

Field	Description of the value
	Note: When importing child records for a parent object, ensure that the child records and the parent records are imported in the same batch (using the same import file). If you import child records in batches using parallel jobs, then the import job may fail because the parent object record may be locked during the import process.

4. Optionally, to set additional import configurations, click the **Advanced Options** section. Here you can configure settings under **Source File**, **Import Options**, or **Create Schedule** sections.
- a. In the **Source File** and **Import Options** regions, some of the options in the following table might not be available depending on the object that you're importing:

Option	Description
Import Mode	You can specify whether you want to create and update records or update them only. - Update and create records - a new record is created if a matching record isn't found. This is the default option. - Create records - all the records in the file are new records which have to be created. If there are any existing matching records, then they're marked as errors. - Delete records - all the records in the file are deleted.
Enable High-Volume Import	The high-volume import mode is designed to import millions of records at once. This mode doesn't trigger any custom logic configured through the application composer. For a list of supported objects, see the topic Data Import Options. By default, this mode is enabled for the supported objects. Note: If ZCA_FILE_IMPORT_ENABLE_CUSTOM_BUSINESS_LOGIC is set to "Yes", then you won't be able to use High Volume import.
Enable Survivorship	Survivorship on update is available for Account, Organization, Contact, and Person. The check box is visible if the attribute survivorship is configured on the objects. You can use high-volume import mode, only when the survivorship configuration uses only Source Confidence. You can't use the high-volume import mode when Data Quality Rules are enabled.
Notification email	The email of the individual who receives import processing notifications. The user submitting the import receives an email notification automatically. To have more than one email recipient, separate the email addresses with a semicolon. If you don't want to receive the notification, then set the profile option ORA_ZCA_IMPEXP_ENABLE_EMAIL_NOTIFY to 'N' at user level.

Option	Description
Enable Custom Business Logic	If you select this check box, then any custom triggers and validations configured for the object are enabled. This may affect import performance, because of configurations. Hence, disable this option for better performance. To enable this check box by default, set the profile option ZCA_FILE_IMPORT_ENABLE_CUSTOM_BUSINESS_LOGIC to 'Yes' by navigating to the Manage Administrator Profile Values task. Note: If ZCA_FILE_IMPORT_ENABLE_CUSTOM_BUSINESS_LOGIC is set to “Yes”, then you won't be able to use High Volume import. Note: This selection has no effect on events and object workflows, and is applicable only on triggers and validations.
Delimiter	If your file doesn't use a comma to separate values, then select the correct delimiter in the Delimiter drop-down list. Possible values are: - Caret Symbol - Closing Curly Bracket - Closing Parenthesis - Closing Square Bracket - Colon - Comma - Exclamatory Mark - Minus - Opening Curly Bracket - Opening Parenthesis - Opening Square Bracket - Pipe Symbol - Plus - Question Mark - Semi-Colon - Star Symbol - Tilde Symbol
Decimal Separator	The decimal separator used in your import file.
Date Format	The format of the date fields in your file.

Option	Description
Time Stamp Format	The format of the time fields in your file.
File Encoding	The format in which your source file is encoded. The possible values are: - Chinese Simplified - GB, CP936 - Chinese Traditional - CP950 - Eastern European - Win, CP1250 - Greek - MS Windows, CP932 - Japanese - Shift- JIS, CP932 - Unicode - UTF-16 - Unicode- UTF-16BE, Mac, Unix - Unicode - UTF-16LE, MS Windows - Unicode - UTF-8 - Western European - Win, CP1252 Note: The above mentioned encoding formats are the only ones supported. Importing file with any other format, such as ANSI, will cause unexpected characters to be imported.

- b. In the **Create Schedule** region, schedule the import to run immediately or at a future date. If you select a future date, then provide the date and time to start the import.

You can save the Advanced Options for subsequent reuse by clicking on the **Save advance options** link in the UI. The options are retained until you click the **Reset** link and reset the options to application defaults.

Note: All fields except Import Mode, Enable Custom business Logic, Enable High-Volume Import, Enable Survivorship Logic, Schedule Mode, and Schedule Start Time will be saved.

- Click **Next**. The **Map Fields** page shows the first row of the data from your source file. By default, the application tries to automatically map each of the source file columns to the appropriate target object attribute. If some of the columns in your file couldn't be mapped, then drag the target attribute onto the **Attribute Display Name** column in the **Source File** region.

The data in unmapped columns aren't imported.

You can save your import map by clicking on **Save As** in the Create Import Activity page. You can use the saved map for future imports. You can view your saved maps by clicking on the **Import Mapping** drop-down list in the Create Import Activity page.

Also, you can select and then edit your saved maps for the specific objects in the Import Objects page.

- You select a predefined mapping from the list of available mappings in the **Import Mapping** drop-down list. If you're reusing an import mapping, then both the source and target columns are already populated.

Leave the Attribute Display Name field blank for any column that you don't want to import.

Click **Validate Data** to check the field mapping.

- In the case of hierarchical import, you can see the mapping information for child objects in the subsequent tabs. Note that data validation isn't done for these objects.

8. Click **Next**. On the **Review and Submit** page, review the import activity configuration. If you had not run the prevalidation on the **Map Fields** page, then you get a notification message to run the validation process. You can view any unmapped columns of parent or child objects on this page.
9. Click **Validate Data** to check the data in your source file. Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns, and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

Note: In import activity with single CSV hierarchical records, explicit validation from the mapping UI isn't supported. For example, while importing the sales territory object, if there are matching values for the attributes ParentUniqueTerritoryNumber and UniqueTerritoryNumber, then validation isn't supported.

Note: During the import validation process on the Mapping page, the following custom triggers aren't supported:

- Before InValidate
- Before Remove
- Before Insert in Database
- Before Update in Database
- Before Delete in Database
- Before Rollback in Database
- After Changes Posted to Database

10. Click **Submit** to queue the import.

Note that business events aren't fired when using Import Management.

Automating and Scheduling Import Jobs

You can automate import jobs using the import REST services. The import REST services let you manage import activities, manage activity maps, and export object metadata. You can use an external scheduler that uses these REST services to run recurring import jobs, create and run import activities, manage maps, and review object metadata.

You can use the Oracle WebCenter Content Document Transfer Utility to manage the import files used by the scheduler. You can download the Oracle WebCenter Content Document Transfer Utility by navigating to the My Oracle Support (support.oracle.com) document Oracle WebCenter Content Document Transfer Utility Readme (document ID 1624063.1). Once downloaded, you can run the tool by navigating to the ridc folder after extraction.

For detailed instructions on automating and scheduling file import using REST API, see Oracle CX Sales and Fusion Service: Automating and Scheduling File Import Activity Using REST API (Doc ID 2308691.1) article on My Oracle Support (support.oracle.com).

Set Up Event Notifications for Resources

In file-based data import, the `sendCredentialsEmailFlag` attribute allowed the import to specify the notification setting for each employee resource. You can do this in Import Management using the User Category option but this applies to all resources in a single import.

To set up notifications for all events:

1. Navigate to **Tools > Security Console** on the home page.
2. Click the **User Categories** tab.
3. Click DEFAULT. Click the **Notifications** tab.
4. Click the **Edit** button. To turn on all notifications, then select the **Enable Notifications** checkbox in the Notification Preferences heading.
5. Click the Save button.
6. Click the Done button.

To set up notifications for a specific event:

1. Navigate to **Tools > Security Console** on the home page.
2. Click the **User Categories** tab.
3. Click DEFAULT. Click the **Notifications** tab.
4. Click the Edit button.
5. To turn on a specific event notifications, click the template for the desired event.
6. On the **Template Information** page, select the **Enabled** checkbox and click **Save and Close**.
7. Click the **Save** button.
8. Click the **Done** button.

Import FCLs and DCLs

Setting FCL Field values

You must pass the lookup code in order to set the FCL field using import management.

Setting FCL and DCL Fields to Null

You must pass #NULL value for the FCL field in order to nullify a value for an FCL using Import Management.

Here is an example to nullify TargetGlobalPJDetailFlag1_c field:

PartyId	TargetGlobalPJDetailFlag1_c
100000001527765	#NULL

Related Topics

- [How do I import attachments?](#)
- [How do I monitor import activities?](#)
- [How do I map import fields?](#)
- [What are the available data import options?](#)
- [What are the roles required to import or export data?](#)

How do I import contract header descriptive flexfield data?

You can use Import Management to create or update Contract Header Descriptive Flexfield records.

To import Contract Header Descriptive Flexfield records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.

The preferred options to uniquely identify an object record are as follows:

- **Internal ID:** If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Contract Header Descriptive Flexfield object, the attribute is Contract Id.

- **Public unique identifiers:** If you're creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with 'Number' and usually visible in the business object's UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Contract Header Descriptive Flexfield object, the attribute is Contract PUID.

Required Attributes and Validations for the Contract Header Descriptive Flexfield Object

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

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Header Descriptive Flexfield Record	Updating an Existing Contract Header Descriptive Flexfield Record
ContractId	The Id of the contract.	This must be a valid contract Id.	Not required	Not required
ContractPuid	The unique PUID that identifies the contract.	This must be a valid contract PUID.	Required	Required
AttributeCategory	Attribute category of the descriptive flexfield	No validation	Not required	Not required
Attribute1	Attribute 1 of the descriptive flexfield	No validation	Required	Not required
Attribute2	Attribute 2 of the descriptive flexfield	No validation	Not required	Not required
Attribute3	Attribute 3 of the descriptive flexfield	No validation	Not required	Not required
Attribute4	Attribute 4 of the descriptive flexfield	No validation	Not required	Not required
Attribute5	Attribute 4 of the descriptive flexfield	No validation	Not required	Not required

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

Note: For importing Context Sensitive DFFs you need to run a query in the "okc_k_headers_all_b" table that contains the DFF you want to import. It lets you find out and populate your "AttributeCategory" field that is required to perform the operation. It's recommended to perform the query on an already existing contract that contains the DFF you want to import, so you can easily find the "AttributeCategory" field. To provide the Attribute category: 1. Create/Update a contract with the Context of DFF you're expecting 2. Get the query output of "Select ATTRIBUTE_CATEGORY from okc_k_headers_all_b where contract_number = '<<Contract Number>>'" 3. Update the value fetched from the above query in the import data file

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

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

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

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)

Why can't I see some classification information in Customer Center?

Customer Center displays the classification and classification group information of a customer in the Classifications node. All classifications are categorized under classification categories.

For example, the 1987 SIC classification category has a classification code of software that you can assign to a party in the software industry.

Customer Center displays the classification information based on the classification categories configured in the Manage Classification Group task. You must configure all classification categories, and their codes, that you want to use in the task so that they can be displayed in the Customer Center. For example, you have imported a customer with a classification code that belongs to the category Major Industry Codes. However, if you don't add the classification category Major Industry Codes in the Manage Classification Group page then the classification code isn't displayed in the Customer Center.

How do I import contact point data?

You can use Import Management to create, update, or delete Contact Point records. You can use contact point to import customer contact information such emails, phone numbers, instant messenger address, web URL, and so on.

To import Contact Point records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the CSV file for a successful import.

- Ensure that you don't insert duplicate addresses while importing, to avoid redundant data.

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- **Public unique identifiers:** If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- **Source system and source system reference:** Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new contacts or are updating contacts that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Contact Point Object

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

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contact Point Record	Updating an Existing Contact Point Record
ContactPointType	Type of the contact point that's imported or updated	This has to be a lookup_code in HZ_LOOKUPS with a lookup_type as COMMUNICATION_TYPE	Provide one of these values: • EMAIL, if the email address is to be imported. • INSTANT_MESSAGING, if the instant messenger address is to be imported. • WEB, if the URL is to be imported. • PHONE, if the phone number is to be imported.	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contact Point Record	Updating an Existing Contact Point Record
PartyId	The internal ID for the party to which the contact point belongs	No validation	Provide one of the following : • PartyId • Party Number • A combination of Party Source System and Party Source System Reference Value	Not required
PartyNumber	Specifies the PUID of the party	No validation	Provide one of the following : • PartyId • Party Number • A combination of Party Source System and Party Source System Reference Value	Not required
PartySourceSystem	Specifies the original source system of the party	This has to be in HZ_ORIG_SYSTEMS_B with the status "A".	Provide one of the following : • PartyId • Party Number • A combination of Party Source System and Party Source System Reference Value	Not required
PartySourceSystemReference	Specifies the party's source system reference in the original source system	No validation	Provide one of the following : • PartyId • Party Number • A combination of Party Source System and Party Source System Reference Value	Not required
SourceSystem	Specifies the original source system name	This has to be in HZ_ORIG_SYSTEMS_B with the status "A".	Provide a valid value.	Not required
SourceSystemReferenceValue	Specifies the identifier in the original source system	No validation	Provide a valid value.	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contact Point Record	Updating an Existing Contact Point Record
ContactPointId	System generated unique identifier. This is the primary key.	No validation	Not required	If you can export the existing contact point, provide this primary key to identify the record for further updates.
Status	The status of the contact point.	Not required This defaults to Y during creation.	Not required	To inactivate an existing active contact point record, you need to set the Import Mode to "Delete Records" and pass Contact Point Id. Contact point Source system, or Contact point Source system reference.
DoContactPreferenceFlag	Add or update a contact's preference to receive e-mail or phone calls on the contact, account or household contact points. This attribute identifies if a contact has made a choice to be contacted.	Don't set both this attribute and DoNotContactPreferenceFlag to Y simultaneously. Set either this attribute or DoNotContactPreferenceFlag to "Y". These are non-mandatory values. However, you can set both this attribute and DoNotContactPreferenceFlag to "N".	Not required	Not required
DoNotContactPreferenceFlag	Add or update a contact's preference not to receive e-mail or phone calls on the contact, account or household contact points. This attribute identifies if a contact has made no choice to be contacted.	Don't set both this attribute and DoContactPreferenceFlag to Y simultaneously. Set either this attribute or DoContactPreferenceFlag to "Y". These are non-mandatory values. However, you can set both this attribute and DoContactPreferenceFlag to "N".	Not required	Not required
DoNotContactReason	Add or update the reason for a contact not to receive e-mail or phone calls on the contact, account or household contact points.	This is used for DoNotContactPreferenceFlag. It is a non-mandatory field.	Not required	Not required

You can view the Contact Point object along with all its child objects and attributes in the Manage Import Objects page of the Import Management flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

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

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

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [How You Use Alternate Keys to Import Records](#)

How do I import product group data?

You can use the import management to create or update Sales Catalog Product Group or Product Group records.

To import Product Group/Sales Catalog Product Group records:

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

How You Map Your Source Data to Target Object Attributes

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .CSV file for a successful import.

Before You Start

You need to set certain options for some attributes in the application before you can populate them. When importing a child record, ensure that its parent record exists in the database.

Select a Unique Identifier for Your Records

To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.

The preferred options to uniquely identify an object record are as follows:

- **Internal ID:** If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier. Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Product Group object, this attribute is ProdGroupId.
- **Public unique identifiers:** If you're creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with 'Number' and usually visible in the business object's UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Product Group object, the attribute is ProductGroupReferenceNumber.

Required Attributes and Validations

To import data successfully into Oracle Applications Cloud, your .CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

This table lists the required attributes for importing new Product Group records, required attributes for updating Product Group records, prerequisite setup tasks for the attributes, and specific validations, if any, for Product Group import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Product Group Record	Updating an Existing Product Group Record
ProdGrpDetailsId	The unique identifier of the product group details.	Long	18	No validation	Not required	Not required
StartDate	The date and time from when the product group is available in the catalog.	Time stamp		The start date can't be later than the end date.	Not required	Optional
EndDate	The date and time when the product group is no longer available in the catalog.	Time stamp		The end date has to be later than the start date.	Not required	Optional
InternalName	The product group's unique name	String	150	Enter a unique name.	Required	This can't be updated.
ProdGroupName	The product group name displayed in the catalog.	String	250	No validation	Required	Optional
ActiveFlag	Indicates whether the product group is active or inactive.	String	1	Enter either Y or N.	Defaults to Y	Optional
AllowDuplicateCont	Indicates whether products or product groups are allowed to be added to the product group hierarchy more than once.	String	Required	Optional	Defaults to N	Optional
ProdGroupId	Unique identifier of the product group	Long	18	No validation	A value is auto generated.	Required
ProductGroupRefer	The unique value used to identify the product group.	String	50	Setup the on prefix and radix. Navigate to the following in the Setup and	A value is auto generated. You can also enter a value.	Required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Product Group Record	Updating an Existing Product Group Record
				Maintenance work area: - Offering: Sales - Functional Area: Data Import and Export - Task: Manage Public Unique Identifier Sequence Generation		
RevenueRoleCode	The code indicating the revenue role associated with the product group. For example, Sales revenue line set or Sales revenue line set member.	String	30	FCL validated against MOO_REVENUE_ROLE lookup	Not required	Optional
RevenueCategoryCode	The code indicating the revenue category associated with the product group. For example, Software, Maintenance, Service, Training, Hardware, or Back Maintenance.	String	30	FCL validated against MOO_REVN_CATEGORY lookup	Not required	Optional
AllowSelectionFlag	Indicates whether the product group is available for selection	String	1	Enter either Y or N. The import operation fails, if updating a record results in: - Circular hierarchy - Parent product group with allow duplicate N and child with Y. - Hierarchy with allow duplicate N results in	Defaults to Y	Optional

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Product Group Record	Updating an Existing Product Group Record
				repeated child/ products.		
ModelName	Unique name of the model	String	1000	No validation	Not required	Optional
ModelConfigAttribu	Model attributes	String	4000	No validation	Not required	Optional
ProdGroupDescripti	Brief description of the product group	String	1000	No validation	Not required	Optional
UsageRootFlag	Indicates whether the product group is the root product group in a hierarchy.	String	1	Enter either Y or N.	Defaults to N	Optional
AttachmentEntityNa	Unique name of the Attachment Entity	String	255	No validation	Not required	Optional

You can view the Product Group object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

You provide the .CSV file as input during the file-based data import process. You must populate the .CSV file with the data you want to import into Oracle Applications Cloud.

You can either create a CSV file on your own or use templates available in preexisting mappings. To download a template:

1. In the **Navigator**, under **Tools**, click **Import Management**.
2. Click **Import Objects** tab to open the **Import Object Details** page.
3. Select the object you're interested in the **Import Object Details** page and click the **Download** icon next to that object name.
4. Save the template CSV file to a location on your desktop.

Note: To import the product group successfully, you should split the import file into Group, Subgroup, and Item.

You must edit the template CSV file and provide valid values for the required attributes. You can attach different types of files, giving each file a specific description.

ProductGroup	InternalName	ProdGroupNam	ProdGroupDes	UsageRootFla	ActiveFlag	AllowDuplicat	StartDate	EndDate
PGSIIImport_001	PGSIIImport_001 InternalName	Display name of PGSIIImport_001	Description of PGSIIImport_001	Y	Y	Y	05/10/2019 10:10	06/11/2019 11:11

Create the Import Activity

To import data into Oracle Applications Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity:

1. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Product Group** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. In the **Create Import Activity: Map Fields** page edit the attribute mappings if required, and click **Next**.

Note: Click **Validate Data** to validate the mapping of the source file for unmapped columns and to check for data format issues.

6. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

Note: On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Related Topics

- [How do I import data?](#)

How do I import incentive participant role assignments data?

You can use Import Management to create or update Incentive Participant Role Assignments.

To import Incentive Participant Role Assignments records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

You import Participant Role Assignments data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

You must do the following before creating the .csv file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .csv file for a successful import

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Incentive Participant Role Assignments Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

This table lists the required attributes for Incentive Participant Role Assignments, prerequisite setup tasks and specific validations, if any

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Participant Role Assignment record	Updating an Incentive Participant Role Assignment record
ParticipantRoleId	The unique identifier of the participant role assignment.	None	Not Required	Required
ParticipantId	The unique identifier of a specific participant.	It must be a valid participant identifier.	Required	Conditionally Required. Provide a value if ParticipantRoleId isn't provided.
RoleId	The unique identifier of the role to which the participant is being assigned.	It must be a valid role identifier.	Required	Not Required
RoleStartDate	Effective start date of the role assignment.	None	Required	Conditionally Required. Provide a value if you want to change the start date.
RoleEndDate	The end date of the role assignment.	None	Optional. Null signifies open end date.	Optional. Null signifies open end date.
AccessType	This indicates whether the role is a Manager role or Member role.	None	Not Required	Not Required
PreserveAssignment	Preserve the changes done to the participant role assignment and prevent the automatic role assignment from updating or deleting this assignment.	None	Not Required. Default value is Yes.	Not Required

You can view the Incentive Participant Role Assignments object with its attributes in the Manage Import Objects page of the Import Management flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

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

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

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [How You Use Alternate Keys to Import Records](#)

How do I enable the verification of addresses, emails, and phone numbers?

This step is a prerequisite to verifying addresses, emails, and phone numbers. You can enable or disable address, phone, and email verification services in the Configure Verification Services page. The Address Verification service is enabled by default.

You can access Address, Email, and Phone Verification service only if you have already purchased Address Verification.

Note: Currently, email and phone validations aren't supported in Customer Data Management UI.

1. You can configure the Verification Services in the Setup and Maintenance work area using the following:
 - Offering: Customer Data Manager
 - Functional Area: Data Quality Verification Services

2. Click the Quick Setup icon.

The Configure Verification Services page appears.

3. Select the verification services you want to enable.

4. Specify if the validity status of email and phone must be displayed.

5. (Optional) If you selected Yes in the previous step, specify the number of days since the last valid verification status was run that the verification status must be displayed. For example, if you set this value to 60, then 60 days after the last valid verification was run the verification status is displayed.

6. Click Save and Close.

How do I apply mass update to accounts and contacts?

You can use the mass update feature to update multiple accounts and contacts at the same time. For example, you might want to change the primary contact or owner on multiple records without having to go into each record and make the changes.

Among the fields that you can update for accounts are:

- Type
- Primary Contact
- Owner
- Industry
- Sales Profile Status

Among the fields that you can update for contacts are:

- Favorite Contact
- Job Title
- Prefix
- Account
- Owner

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

Steps to Apply Mass Update

Here's how to update several fields on multiple accounts or contacts at once:

1. Navigate to the **Accounts** or **Contacts** landing page.
2. Search for the records you want to update.
3. Click **Update** from the **Actions** menu.
4. Select the records that you want to update and click the **Update** button.
5. Select the fields and assign or enter values for them. Keep in mind:
 - If you want to update a field that has a parent field, then the value of the parent field must be the same across all child records selected for mass update.

- You can't apply mass update to conditionally updatable fields.
- 6. When you're done making updates click **Submit**.

Related Topics

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

What's the size limit for attachment files in the sales application?

Users can attach files, such as PDFs and Word docs, to both standard and custom objects. By default, the file size limit for an individual, attached file is 2 G. You can decrease this limit, but you can't increase it.

There are no limits placed on the number of files. The size of the files is controlled centrally by the File Upload Maximum Size (FND_FILE_UPLOAD_MAX_SIZE) profile option.

Also note:

- The only limit on the total file size that can be uploaded is the amount of available space that you have purchased for the content server.
- There are no restrictions on the types of files you can attach.

How do I apply the Redwood look to my home page and configure the page?

Your application should have the Redwood look by default. If not, you can apply the Redwood look by selecting the Redwood theme. You can upload your own logo, cover image, or both, and save your updates as your own theme.

Here's how:

1. Activate a sandbox that has the Appearance tool in it.
2. Click **Navigator > Configuration > Appearance**.
3. From the **Themes** list, select **Redwood** or a custom theme that someone created based on Redwood.
4. In the **Logo** and **Cover Image** fields, select the type of location where the images are stored, and do any of these tasks based on what you select:
 - **File**: Browse and select a file from your computer.
 - **Predefined**: Select a file from the list of predefined images.
 - **URL**: Enter a full URL for the logo.
 - **None**: You don't need to do anything.

Here are a few best practices for configuring the logo and cover image:

- Make sure that the file names for your images don't have any spaces in them.

- Use a logo of width less than 200 pixels and height less than 50 pixels.
 - Upload a monochrome version of your logo that's optimized for a dark background. The logo also needs to be on a transparent background. The Redwood theme is optimized for a monochrome version of your organization logo to maximize readability and accessibility, and to minimize unintentional color blending.
 - Use a cover image of size 2600x290 pixels.
 - After you upload a cover image, its colors are processed, and a Redwood color overlay is applied on the processed image. So your cover image will look slightly different from the original image you uploaded. The coloring process maximizes readability and accessibility, and minimizes unintentional color blending.
5. On the **Actions** menu, click **Save As**.
 6. Enter a theme name.

Note: You must enter a unique name that doesn't match with the name of any existing theme in your application.
 7. If you don't want to apply the theme to the application immediately, deselect the **Apply this theme** check box.
 8. Click **OK**. If you've selected the **Apply this theme** check box, then your theme is saved and set as the current theme. If you haven't selected the check box, your theme isn't applied to the application. But the theme is saved, and you can apply it to your application later.

If my organization forecasts by opportunity owner, how do I assure salespeople see their forecasts after importing resources?

If your organization forecasts by opportunity owner and you import salespeople (resources) you must run 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 do I set up Global Search if it isn't working?

If the Global Search at the top of your Home page isn't working, check your Adaptive Search setup. 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 Global 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:

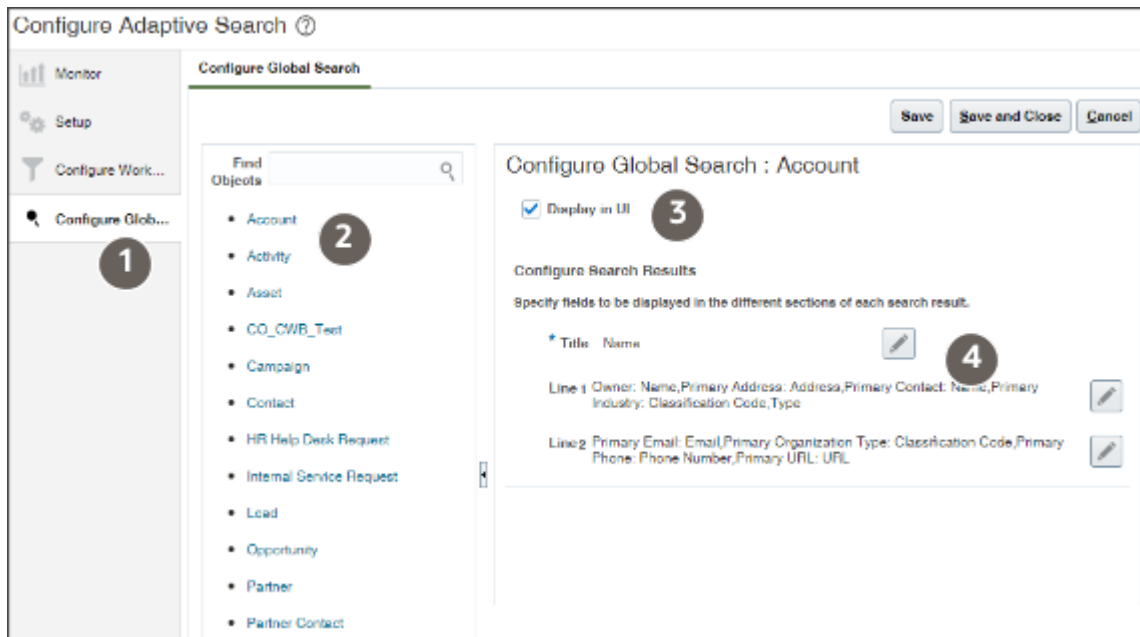
The screenshot displays the 'Global Search' window. At the top, there is a search bar containing the text 'pinnacle' and a magnifying glass icon. Below the search bar, there is a section for 'Applied Filters' with a 'Clear All Filters' link. Underneath, there are tabs for 'Categories' and 'Accounts', with 'Accounts' being the active tab. The 'Search Results' section shows '10 Results' and a 'Show Filters' button. Three account results are listed:

- Account: Pinnacle (Appleton, US)**
Type: Prospect | Primary Address: Address: Seattle, APPLETON, WA | Owner: Name: Dan Foreman
- Account: Pinnacle Technologies (SEATTLE, US)**
Type: Customer | Primary Address: Address: 600 4th Ave Rm 107, SEATTLE, WA 98104-1850 KING | Primary Industry: Classification Code: Retail | Owner: Name: Gabrielle Lee
- Account: Pinnacle Inc (Redwood City, US)**
Type: Customer | Primary Address: Address: 500 oracle parkway, REDWOOD CITY, CA | Owner: Name: autoapisladmin svc
Primary Contact: Name: John Smith

Here's how to enable Global 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**.

If Global Search configuration is setup properly, you can try these troubleshooting tips to get it working:

- From the **Tools > Scheduled Processes** page, search for and run the **Search Index Optimization** and **Full Text Search Index Synchronization** processes.
- Clear your browser cache and sign out and sign in again.
- Verify if Global Search works in incognito mode.

How do I stop users from being spammed with reminders?

You can reduce number of reminders by controlling which notifications are sent to salespeople about tasks and other activities by setting profile options.

Company-Level Notifications

For the entire company, you can specify whether users:

- Receive notifications as owners of an activity
- Receive notifications if they aren't the owners of an activity
- Receive task notifications if changes are made to completed tasks

For both appointments and tasks, you can specify:

- Whether users receive email notifications
- Whether users receive notification messages in the notifications list

Note: If you enable email notifications at the company level, each individual user can still choose not to receive email notifications. If you enable notifications in the notifications list, each individual user can still choose not to receive notifications in the notification list.

Here are the profile options for setting up company-level activity notifications:

Profile Option Name	Default Value	Description
Task Notification to Contacts and Consumer Customers Enabled	N	Enables notifications to external participants when tasks are created, updated, or deleted
Appointment Notification to Contacts and Consumer Customers Enabled	Y	Enables notifications to external participants when appointments are created, updated, or deleted
Disable Appointment E-Mail Notification	N	Specifies whether to disable appointment email notifications
Disable Task E-Mail Notification	N	Specifies whether to disable task email notifications
Disable Task Notification List	N	Specifies whether to disable task notifications in the notifications list
Disable Appointment Notification List	N	Specifies whether to disable appointment notifications in the notifications list

User-Level Notifications

You can set several profile options at the user level to control the behavior of notifications. The user preferences setting are stored in the profile options. Users can modify their notification preferences using the preferences pages, located under their user names in the global area.

Here are the user-level profile options for activity notification preferences:

User Name	Default Value	Description
Appointment Owner Notifications	N	Enables receiving appointment notifications when the user is the owner of the appointment
Appointment Resource Notifications	Y	Enables receiving appointment notifications when the user is a resource or invitee of the appointment
Task Owner Notifications	N	Enables receiving task notifications when the user is the owner of the task
Task Resource Notifications	Y	Enables receiving task notifications when the user is a resource on the task
Task Notifications For Completed Tasks	N	Enables receiving task notifications for tasks that have already been completed
Notification List Appointment Notifications Enabled	Y	Enables receiving appointment notifications in the notifications list
Email and List Appointment Notifications Enabled	NA	Enables receiving appointment notifications in the notifications list and through email
Notification List Appointment Notifications Enabled	Y	Enables receiving appointment notifications in the notifications list
E-Mail Task Notifications Enabled	Y	Enables receiving task notifications by email
E-Mail Appointment Reminders Enabled	Y	Enables receiving appointment reminders by email notifications
Notification List Appointment Reminders Enabled	N	Enables receiving appointment reminders in the notifications list
Owner Initiated Task Notifications Enabled	N	Enables receiving task notifications when a user creates, updates, or deletes a task and they're the owner of the task
Owner Initiated Appointment Notifications Enabled	N	Enables receiving appointment notifications when a user creates, updates, or deletes an appointment and they're the owner of the appointment

How to Disable Notifications for the Entire Company

You can disable activity notifications globally, so that no one in the company receives notifications. To disable notifications:

1. In the Setup and Maintenance area, go to:
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o Task: Manage Administrator Profile Values
2. Enter the profile option to disable email or appointment notification, in the Profile Option Code field.

Here the items you can disable and the profile options you use to disable them, company-wide:

What to Disable	Profile Option
Appointment email notification	ZMM_ACTIVITY_DISABLE_EMAIL_APPT_NOTIF
Task email notification	ZMM_ACTIVITY_DISABLE_EMAIL_TASK_NOTIF
Appointment notification in the notification list	ZMM_ACTIVITY_DISABLE_LIST_APPT_NOTIF
Task notification in the notification list	ZMM_ACTIVITY_DISABLE_LIST_TASK_NOTIF

3. For each item you're disabling, change the related site-level profile value to Yes.

How can I protect supporting documents from deletion?

You can protect your supporting documents from being inadvertently deleted. Adding the new privilege, Delete Supporting Documents by Contract Status, to the required roles lets you restrict the deletion of supporting documents in all contract statuses other than Draft and Under Amendment.

To restrict the deletion of supporting documents in all contract statuses, revoke the existing privilege, Delete Supporting Documents, for specific roles.

This table describes how you can configure the privileges

Delete Supporting Documents Privilege	Delete Supporting Documents by Contract Status Privilege	Result
Yes	Yes	User can delete supporting documents in all contract statuses
Yes	No	User can delete supporting documents in all contract statuses
No	No	User can't delete supporting documents in any contract status
No	Yes	User can delete supporting documents only in Draft and Under Amendment contract status

The supplied privilege, Delete Supporting Documents by Contract Status Privilege, isn't assigned to any role by default. Add the privilege to the necessary roles and revoke the existing privilege, Delete Supporting Documents.

For information about how to add and remove privileges to user roles, see the [Edit Job or Abstract Roles](#) topic.

How can I fetch only supplier sites that belong to the supplier on a contract?

Add the Contract Party Contact DFF to the contract header. The header DFF has the contract_id parameter and it can be passed into the where clause condition and by using a where clause condition.

Here are the values to pass to the table value set of the supplier site DFF field:

- FROM: okc_k_headers_all_b a, okc_k_party_roles_b b, POZ_SUPPLIER_SITES_ALL_M c, POZ_SUPPLIERS d
- VALUE COLUMN NAME: VENDOR_SITE_CODE
- WHERE CLAUSE:
 - o a.id = b.chr_id
 - o and a.major_version = b.major_Version
 - o and b.RLE_CODE = 'SUPPLIER'
 - o and c.VENDOR_ID = d.vendor_id
 - o and c.PRC_BU_ID = a.org_id
 - o and d.party_id = b.OBJECT1_ID1
 - o and a.contract_id = :{PARAMETER.ContractId}

Can contracts deliverables functionality be used in standalone mode?

No, you can't use Enterprise Contracts without its deliverables. It always exists in the context of a document, such as a contract or purchase order.

Related Topics

- [Contract Deliverables](#)

How do I create membership rules for custom access groups?

You can add resource users to a custom access group by defining one or more group membership rules. Each rule consists of conditions that determine which resources are added as members of the group.

Any users who satisfy the conditions are automatically added to the access group. Group members who no longer meet the conditions are automatically removed from the group. You can't manually remove group members added through group membership rule processing.

Here's how you can create a group membership rule to add members to your access group:

1. On the Access Group page, select the group you're creating the membership rule for.
2. On the Edit Access Group: Overview page, select the **Member Rules** tab, then click **Create Rule**.
3. On the Access Group: Create Group Membership Rule page, enter a **Name** for the group membership rule and a **Description** if required.
4. In the Conditions section, specify the rule conditions.

Each rule consists of one or more conditions that are evaluated individually. You can choose whether the rule action applies if any conditions are met, or only if all conditions are met, by selecting the appropriate value from the **Rule Applies If** list.

5. Enter a rule condition by clicking the **Add** icon and enter the values shown in the following table:

Field	Description
Object	Select either the Resources object or the Resources Hierarchy object. Only resource users can be added to an access group, so you can only select one of these objects.
Attribute	Select an attribute from the list. Both custom and standard attributes defined for the object you selected are listed.

Field	Description
	Support for a number of resource object attributes will be discontinued in future releases. So to prevent issues in the future: ○ Avoid using these attributes: User Account Status, Company, Phone, Job Title, Manager First Name, Manager Last Name, Organizations, Teams, Usages ○ Use custom attributes that are based on database columns only. Avoid using custom attributes, such as attributes based on the Formula field, that aren't based on database columns. Support for attributes that aren't based on database columns will be deprecated in future releases.
Operator	Select the operator for your condition. For example, Equals or Is blank. Tip: If an attribute can have multiple values, such as the Roles or Teams attributes, use the Contains operator instead of the Equals operator to make sure that the condition adds all the intended resources to the group. For example, if you create a rule, Roles Equals Salesperson, then users who are assigned only the Salesperson role are added to the group. If you create a rule, Roles Contains Salesperson, then users assigned the Salesperson role and any other role are also added to the group.
Value	Enter a value for the attribute, if relevant. If you're entering more than one value, separate each value with a comma.

Enter as many conditions as needed to suit your specific requirements. For example, if you want to add all resources who are sales representatives based in the Sales Support organization to your group, create two conditions with values similar to these and choose the **All conditions met** value from the **Rule Applies If** drop-down list.

This table lists example values for the fields in a rule condition:

Field	Condition 1	Condition 2
Object	Resources	Resources
Attribute	Job Title	Organization
Operator	Equals	Equals
Value	Sales Representative	Sales Support

6. From the **Actions** menu, select **Save and Publish** to ensure that your changes get included in the assignment processing.
7. Click **Save and Close**.

8. Start the Run Access Group Membership Rules scheduled process to ensure that the access group membership rules are assigned.

The Run Access Group Membership Rules scheduled process automatically runs every hour to update access groups with changes to the group membership. But you can also run the process at any time from the Access Groups main page by selecting the **Update Groups and Members** option from the **Actions** menu. For example, if you edit a rule, it's a good idea to run the process straight away.

When the process completes, navigate to the Edit Access Group: Overview page where you can see that all the resources who meet the rule conditions are added to the group. Notice that the Member Type field is set to **Rule** for all the new members.

You can edit a group membership rule at any time by selecting the rule from the Edit Access Group: Group Membership Rules page. You can also delete or inactivate the rule. If you delete or inactivate a rule, any users added to the group through the rule are removed when the Run Access Group Membership Rules scheduled process is next run.

For information about running scheduled processes, see the Understanding Scheduled Processes guide.

Related Topics

- [How do I create and manage access groups?](#)
- [Can I rename a custom role in an access group?](#)
- [How do I enable team-based access to custom objects when using access groups?](#)
- [How do I configure real-time and near real-time access for access group object records?](#)
- [Understanding Scheduled Processes](#)

Why can't my ERP users access Sales and Service data?

Oracle's ERP roles don't give the same access as Sales and Service roles. Analyze your user's needs and give the appropriate roles to the Sales or Service user.

See the related topics for more information.

Related Topics

- [How do I troubleshoot user access issues?](#)
- [Review a User's Access to Object Data](#)
- [Types of Sales Users](#)

What roles do suppliers need to get access to the Procurement Contracts pages?

Supplier users need specific roles to access the Procurement Contracts pages are:

On the Enterprise Contracts side, the roles are:

- Supplier Contract Administrator

- Supplier Contract Manager

See the *Security Reference for Enterprise Contracts* guide for more information on these roles.

On the Procurement Contracts side, the roles are:

- Supplier Administrator
- Supplier Manager

See the *Security Reference for Procurement* guide for more information on these roles.

What are the supported electronic signature (eSignature) providers?

The supported eSignature providers are DocuSign and OneSpan.

How do I enable notifications for Sales?

You define and generate notifications with a Groovy script in Application Composer, using conditions that must be met for each notification. When a notification is created on an account that salespeople own, you can specify the notification recipients.

For example, you can reference sample Groovy scripts to define and activate notifications for salespeople when:

- They're added to the account team.
- They're designated as owner of an account.
- An account they own has been deleted.
- A sales object is assigned to an account.

Note: Before you enable notifications for Sales, ensure that you have enabled notifications generally. For steps, see the topic, *Disable or Enable Workflow Notifications*. If you update the applications, be sure to go back and check these settings again.

Notifications are lined up in a queue, and you can manually add a record to a queue by changing the owner. Or, you can add a notification to a queue based on specific criteria. You can use a rule or condition to add leads to a queue based on specific record criteria, for example. Records remain in a queue until they're assigned an owner.

Here's how you enable notifications.

1. Sign in as a setup user.
2. In the Setup and Maintenance go to:
 - Offering: Sales
 - Functional Area: Sales Foundation
3. Click the drop-down button in the Sales Foundation row.
4. Click **Change Feature Selection** in the menu. The Edit Features: Sales Foundation page appears.

5. Select the **Enable** check box for the notification-related features you want to set up. This enables notifications for the Sales objects.

Note: This opt-in is for your chosen channel or communication path, such as bell notifications, and not for specific objects.

6. Click **Done**.

How do I import contract line data?

You can use Import Management to create or update Contract Line records.

To import Contract Line records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.

The preferred options to uniquely identify an object record are as follows:

- **Internal ID:** If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications

Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Contract Line object, the attributes are Line Id and Id.

- **Public unique identifiers:** If you're creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with 'Number' and usually visible in the business object's UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Contract Line object, the attribute is Line PUID.

Required Attributes and Validations for the Contract Line Object

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

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Line Record	Updating an Existing Contract Line Record
ContractPuid	The unique PUID that identifies the contract	No validation	Required	Not required
ItemName	The item name for an item type of line	This must be a valid inventory item.	Required for an item type of line	Not required
ItemNameTxt	The item name for a free form type of line	No validation	Required for a free form type of line	Not required
ItemQuantity	The line quantity.	No validation	Required for an item type of line	Not required
LineAmount	The line amount.	No validation	Required for a free form type of line	Not required
LineNumber	The number of the contract line.	This must be a unique number within a contract.	Required	Not required
LinePuid	The unique PUID that identifies the contract line.	This must be a unique PUID across all contract line records.	Required	Required
LineStatus	The line status	This must be one of Active, Draft, Closed, or Canceled.	Required if StsCode isn't entered	Not required
LineTypeld	The Id that represents the line type.	This must be valid as per OKC_CONTRACT_TYPE_LINES.	Required if LineTypeName isn't entered	Not required
LineTypeName	The name of the line type.	This must be valid as per OKC_CONTRACT_TYPE_LINES.	Required if LineTypeld isn't entered	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Line Record	Updating an Existing Contract Line Record
StartDate	The date from which the contract line becomes effective.	No validation	Required	Not required
StsCode	The code that represents the line status	This must be one of ACTIVE, DRAFT, CLOSED, or CANCELED	Required if LineStatus isn't entered	Not required
UnitOfMeasure	The unit of measure of the contract line.	This must be a valid unit of measure in INV_UNITS_OF_MEASURE_TL.UNIT_OF_MEASURE.	Required if the UOMCode isn't entered	Not required
UnitPrice	The unit price of the line.	No validation	Required for an item type of line	Not required
UOMCode	The UOM code of the contract line.	This must be a valid unit of measure in INV_UNITS_OF_MEASURE_B.UOM_CODE.	Required if the UnitOfMeasure isn't entered	Not required

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

Note: The attribute PriceAsOf can't be updated.

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.

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

Review the Import Results

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

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

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)

How do I import contract data?

You can use Import Management to create or update Contract data.

To import Contract records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application.

Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

Note: You can't update or customize a PUID. You can provide a unique value. If left blank, the system will generate a unique identifier.

Required Attributes and Validations for the Contract Object

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

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Record	Updating an Existing Contract Record
ContractNumber	The alternate unique identifier of the Contract.	No validation	Required	Not required
ContractPuid	The unique PUID that identifies the Contract.	This number identifier must be unique across Contracts of all types.	Required	Required
ContractTypeld	The unique ID of the Contract type. The Contract type sets various properties for the Contract such as the type of permitted Contract lines, party roles, Contract validation checks, and the Contract acceptance and signature requirements.	You can determine and manage Contract types. Navigate to the following in Setup and Maintenance: • Offering: Sales • Functional Area: Sales • Task: Manage Contract Types	Required if ContractTypeName isn't entered.	Not required
ContractTypeName	The name of the Contract type. The Contract type sets various properties for the Contract such as the type of permitted Contract lines, party roles, Contract	You can determine and manage Contract types. Navigate to the following in Setup and Maintenance:	Required if ContractTypeld isn't entered.	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Record	Updating an Existing Contract Record
	validation checks, and the Contract acceptance and signature requirements.	- Offering: Sales - Functional Area: Sales - Task: Manage Contract Types		
Currency	The name of the currency in which Contract amounts are entered.	This must be a valid currency.	Required if CurrencyCode isn't entered	Not required
CurrencyCode	The code of the currency in which Contract amounts are entered.	This must be a valid currency.	Required if Currency isn't entered	Not required
InvOrganizationId	The unique Id representing the item master organization	This must be a valid ORGANIZATION_ID from the HR_ALL_ORGANIZATION_UNITS_F table.	Required if the InvOrgName isn't entered	Not required
InvOrgName	The name representing the item master organization.	This must be a valid ORGANIZATION_ID from the HR_ALL_ORGANIZATION_UNITS_F table.	Required if the InvOrganizationId isn't entered	Not required
LegalEntityId	The unique Id of the legal entity to which the Contract belongs.	This must be a valid record as per GL_LEDGER_LE_V.	Required if the LegalEntityName isn't entered.	Not required
LegalEntityName	The name of the legal entity to which the Contract belongs.	This must be a valid record as per GL_LEDGER_LE_V.	Required if the LegalEntityId isn't entered.	Not required
OrgId	The unique Id of the business unit to which the Contract belongs.	This must be a valid business unit Id.	Required if the OrgName isn't entered	Not required
OrgName	The name of the business unit to which the Contract belongs.	This must be a valid business unit name.	Required if the OrgId isn't entered	Not required
StartDate	The date on which the Contract comes into effect.	No validation	Required	Not required
StsCode	The code of the Contract status. Examples are ACTIVE, DRAFT, CLOSED, and CANCELED.	Navigate to the following in Setup and Maintenance: - Offering: Sales - Functional Area: Sales	Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Contract Record	Updating an Existing Contract Record
		Task: Manage Standard Lookups Search for the Contract Statuses lookup. Activating a draft contract, and one-time import of closed, canceled, and active contracts is supported. You can't update the contract status from active to any other status. Also, you can't update a contract once it is active. You can't import contracts in EXPIRED status directly in the system. You must import the contracts with ACTIVE status and then update contract status to EXPIRED.		

Note: Keep a note of the following:

- The attribute **GeneratedInvoiceStatus** must have one of the following values:
 - D for Draft
 - S for Submitted for approval
 - R for Released
 - Ensure to provide one of the values D, S, or R while importing Project contracts.
- SupplierId is the party identifier of the supplier and SupplierSiteId is the party site identifier of the vendor.
- When you import contracts using the contract type column with the contract numbering method set as Automatic, you can leave the ContractNumber column blank in the CSV file for the application to generate the contract numbers automatically. You can also enter the contract number manually when you don't want the application to assign the contract numbering automatically.
- When the contract type has the contract numbering method set as Manual, you can't leave the contract number blank. If the contract number is left blank, then the application generates an error.
- To activate a contract while importing, provide the value 'ACTIVE' for the StsCode attribute. This will also activate the lines added to the contract.
- To import contracts that are closed, canceled, or on hold, you must first import the contract with all required import files, and then re-import the contract import file with the following information:
 - Closed contracts: You must include Status (the status will be Closed), Close reason code, CloseReasonSetCode, Termination Date.
 - On-Hold Contracts: You must include Status (the status will be Hold), Hold Reason Code, Hold reason Set Code, Hold Until Date.
 - Canceled contracts: You must include Status (the status will be Canceled), Cancel Reason, Cancel reason set code, Cancel date.
 - To avoid the modification of the contribution percentage you must include the contribution percentage in the same import file that you're using to activate the contract.

• To import data in other languages, use the column attributes "Language and Source Language" in Contract header file and set the preferred language. Then import the parties with the desired values. You can view the Contract object and attributes in the Manage Import Objects page of the Import Management flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

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

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

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)

How do I import incentive transaction data?

You can use the import functionality to create or update Incentive Transaction records.

To import Incentive Transaction records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .CSV file for a successful import.

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.

The preferred option to uniquely identifying an object record is through the Internal ID. If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier. Attributes with "id" in the attribute name are typically internal IDs. Use this option only if you're updating Incentive Transactions. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Incentive Transaction object, the attributes are Transaction Number and Transaction Type.

Required Attributes and Validations for Incentive Transaction Object

To import data successfully into Oracle Applications Cloud, your .CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new Incentive Transaction records, required attributes for updating Incentive Transaction records, prerequisite setup tasks for the attributes, and specific validations, if any, for Incentive Transaction import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Incentive Transaction Record	Updating an Existing Incentive Transaction Record
Business Unit	Name of the business unit	Varchar2	240	To find the business unit: 1. Navigate to Setup and Maintenance. 2. Navigate to the Manage	Required A value is required either for the Business Unit or the Business Unit Id.	Required A value is required either for the Business Unit or the Business Unit Id.

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Incentive Transaction Record	Updating an Existing Incentive Transaction Record
				Business Units task. In the Search results region, search for the name and select the name that's displayed. Note: You can export the results to a spreadsheet and use this information to identify and assign the Business Unit values to the data that you're preparing.		
Business Unit ID	Unique numeric identifier for the Oracle Fusion Incentive Compensation business unit.	Number	18	To find the business unit: - Navigate to Setup and Maintenance. - Navigate to the Manage Business Units task. - In the Search results region, click the View menu and add the Business Unit ID Column. Note: You can export the results to a spreadsheet and use this information to identify and assign the Business Unit ID values to the data that you're preparing.	Required A value is required either for the Business Unit or the Business Unit Id.	Required A value is required either for the Business Unit or the Business Unit Id.

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Incentive Transaction Record	Updating an Existing Incentive Transaction Record
Event Date	When the transaction triggers an incentive event associated with the row, for example, salespeople are compensated when an invoice is booked or an order is posted.	Date		The period must be open before you can collect the transaction into the application.	Required	Required
Transaction Amount	The transaction amount to be evaluated by the credit and earning processes.	Number		If providing a monetary amount, the amount should be in the currency of the source application.	Required	Required
Transaction Number	Unique transaction identifier used in the source application. The combination of Source Transaction Number and Transaction Type values must be unique, and is validated during the Collect Transactions process.	Varchar2	30	Map an identifier that end users recognize and can search. For example, map your source invoice number and invoice line number to this field.	Required	Required
Transaction Type	Defines the type of the transaction. Predefined transaction types are CLAWBACK, CUSTOMER_SATISFACTION, GRP, INVOICE, ITD, MANUAL, ORDER, PAYMENT, and RAM_ADJUSTMENT.	Varchar2	30	The value must be a valid lookup code for lookup type CN_TP_TRANSACTION_TYPE. To define your own transaction types: 1. In Setup and Maintenance, go to the Manage Incentive Compensation Lookups task. 2. Search for CN_TP_TRANSACTION_TYPE.	Required	Required

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Incentive Transaction Record	Updating an Existing Incentive Transaction Record
				3. Add your transaction types.		

You can view the Incentive Transaction object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Note: Don't use the Transaction Sub-Type attribute. It's intended for internal use only.

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.

3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

Note: On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)

How do I monitor import activities?

You can monitor imports that were scheduled to run, have completed successfully, or have failed with errors. For each import, you can view the details and make the necessary updates for any failed records that you want to import again.

You can view the list of imports from the **Manage Imports** page of the Import Queue tab. To view the status of an import job click the link in the import's Name column. The **Import Status** page shows the status of the most recently executed instance of the import. The **Import Status** page contains the following sections:

- Status Bar
- Details
- Import Attachments

Status Bar

The status bar shows the progress of the import in a graphical format. It shows the following stages during the import process:

- Import activity queued: The import request is queued for processing, and is waiting to begin execution.
- Preparing data for import: The data from the source file are being loaded in the temporary staging table for further processing.
- Importing data: The data from the source file are being validated and loaded in the target tables.
- Completing import activity: The import data have been loaded in the target tables, and cleanup tasks, such as the generation of log files, are in progress.
- Completed with errors: The import has completed with errors.
- Successful: The import has completed successfully.
- Completed with warnings: The import has completed with warnings.
- Canceled: The import was canceled by the user.
- Unsuccessful: The import was unsuccessful.

Hovering your mouse over the progress bar shows the status on the number of records imported.

Note: If the job is in the same status for a long time, then generate a diagnostic log as described in the topic Generate the Diagnostics Log for Import in Related Topics section. When you raise a service request, attach the diagnostic log files to help technical support to resolve the issue.

Activity and Record Details

The **Activity Details** section shows the name of the import, import activity identifier, object name, and the name of the user who submitted the import. The section on date and time displays the start and end times, estimated completion time, and the time taken to complete the import.

The **Record Details** section displays the number of import records in each stage of processing. The various status details are summarized in the following table:

File Processing Summary Information	Description
Records Read From File	The number of records read from the source file. Clicking the link for the number of records lets you download the spreadsheet file with the records.
Records Loaded Successfully	The number of import object records that were imported to the application destination tables.
Records With Errors Reported	The number of records that failed with errors when importing data from the interface tables to the destination tables. You can view the error details in the Exception and Error files attached to the process. Clicking the link for the number of records lets you download the spreadsheet file with the error records.
Records With Warnings	The number of records that were uploaded with warnings when importing data from the interface tables to the destination application tables. Clicking the link for the number of records lets you download the spreadsheet file with the warning records.
Unprocessed	The number of records that weren't processed.

Clicking on the Advanced Options section shows the advanced configuration options that you had selected when creating the import activity.

The rejected file records don't contain the error message when import job ends in unsuccessful status.

Note: In the files that are generated after the completion of an import activity, all error message values are enclosed within double quotation marks. The use of double quotation marks improves the format of the log files by ensuring that the error messages containing commas aren't treated as multiple values.

Detailed Import Status

The Detailed Import Status page shows the status of the different steps in the import activity. You can navigate to this page by selecting View Detailed Import Status from the Actions menu on the Status page. For each step, this page shows the individual sub tasks of the import process. This information helps the technical support team to fix any issues during the import.

Purge Import Data

Import Management periodically runs an automatic process that purges all data associated with import jobs. This process purges data older than 7 days by default. You can extend this time to 30 days by setting the value in the profile option `ZCA_IMPORT_PURGING_DURATION`.

If you wish for the data to be purged instantaneously on job completion, you can do the same using the `ZCA_IMPORT_PURGE_ON_JOBCOMPLETION` profile option. The default value for this profile option is Y and impacts data for all objects except the ones registered as 'ObjectPostProcess'

Alternately, if you want to control purging through the UI from the Import Object Details Page, you can set the `ZCA_IMPORT_PURGE_FROM_UI` profile option to Y to display the purge option on the Import Object Details page.

Import Attachments

The **Import Attachments** section lists the files associated with this import in a table. The **Actions** column lets you either download the file or view more details. Success log file isn't generated after the import job is completed successfully. To generate success logs for even successfully completed jobs, set the profile option `ZCA_IMPORT_SUPPRESS_SUCCESSLOG_GENERATION` to 'No'. You can download the following files from this section:

- Process Log: Click **Action** > **Generate Log**.
- Diagnostics Log file: Click **Action** > **Generate Diagnostics**.
- Map file: Click the **Download** link to download the import activity map file in CSV format.
- Source CSV file used for the import.
- Exception files that include a row for each record that failed. All the errors for that row are concatenated and displayed in the Error Message column of the file.
- Error file that includes all the errors for each record that failed validation.

Related Topics

- [How do I import data?](#)
- [How do I generate the diagnostics log for import?](#)

What are the best practices for high volume data import?

Here are some best practices for high volume data import.

At some time, you might need to load large volumes of data into your CX Sales and B2B Service instance. For example, during initial roll-out, expanding use of CX Sales and B2B Service to other users or divisions, or expanding use of CX Sales and Fusion Service to include other object types (for example, adding support for Service objects).

When loading large volumes of data to CX Sales and Fusion Service, one of the key considerations is the time taken to import data. Reducing the amount of time required to import a large volume of data is crucial, if you have a limited period of time to run the data imports (for example, during a weekend migration). Oracle recommends certain best practices that you can use to improve the performance of the data import.

Actual throughput varies for users based on a number of factors including the volume of data contained in each record, the number of relationships being created during data import, and the number of records in your source file.

Before executing the data import in a production environment, Oracle recommends that you perform these functional validation and performance optimization procedures in your test environment:

- Data Cleansing
- Validate Functional Import
- Optimization Process

Performing these exercises in your test environment ensures that these exercises don't impact existing operations or the data in your production environment.

Data Cleansing

Before proceeding with high volume imports, you need to clean the data being imported thoroughly. Ensuring that your data is in the correct format reduces the number of errors that are encountered during data import. This benefits your overall throughput in two ways:

- Processing time isn't wasted on attempting to import records that can't be imported.
- You don't have to review error logs, fix issues, and reimport data. It costs less to clean your data before attempting a data import than it does to fix issues that arise during data import.

When cleaning the data, note the following:

- Field Length - ensure that the data doesn't exceed the maximum field length in OSC
- Data Type - ensure that the data is of the correct type for the field to which it's being imported in OSC
- Required - ensure that a value is provided for all mandatory fields
- Conditionally Required - in some cases, a value is required based on the value provided for another field (for example, for Opportunity a Close Date is required if the Status of the Opportunity is set to Closed)
- Foreign Keys - provide a valid value for foreign keys to create relationships between records. The foreign keys can vary for every object.

By ensuring that your data is clean, you can avoid many issues associated with importing your data from your legacy application into CX Sales and Fusion Service.

Validate Functional Import

To verify that you have successfully cleaned your data, Oracle recommends that you validate your import in your test environment with a small set of data. Follow these guidelines to validate the functional import:

- Before you import large volumes of data, ensure that your import completes successfully and that the resulting data matches your expectations. This includes ensuring that the data is imported to the correct object, fields have been mapped correctly, and relationships are imported properly.
- Import a small number of records including values for each attribute. Oracle recommends that you use the smallest set of input data possible that can still save the variations present in your full data set.
- Identify any data issues that are reported in the import log files. Fix any specific issues reported for rows with errors. If a row doesn't have an error reported, then don't reimport that row. After you resolve all the issues and successfully import your subset of data, apply any changes to your larger data set (for example, if you

determine that your time stamp format is incorrect, fix this for all records in the input data file for your full data set).

Optimization Process

Importing high volume of data is a project and should be included in the project plan for your implementation. You need to allocate time for the actual import of data and for the design and optimization of the import process for your data set.

When optimizing the data import, you identify the number of records to be included in your input data file as well as the number of concurrent import activities that can be activated. You trigger concurrent import activities by running more than multiple data import operations simultaneously. The number of concurrent import activities is the number of data imports that are running and haven't yet completed. Running import activities serially or running too many import activities concurrently can lower your throughput. Finding the right values for these two parameters is a key aspect of designing your import process. There's no right answer for every situation. Every data set is different; you need to repeat this process for any new data import operations that you plan to perform.

Note: Don't import more than 100,000 records in a single import operation or perform more than five concurrent import activities.

Oracle recommends that you adhere to this process when planning high volume data import:

- Establish baseline performance
- Scale up import volume
- Optimizing Concurrent Import Activities

Each of these steps is explained in greater detail.

Establish Baseline Performance

Oracle recommends that after you have cleaned your data and validated that your import is functionally correct, you should begin the process of scaling up your import volumes. The first step in this process is to establish a performance baseline. This involves performing a set of serial imports using a high volume of records.

Oracle recommends that you begin by importing a small number of records (a few hundred to a few thousand) in a single import activity. For example, you may import 10,000 records using four import activities of 2,500 records each. After these data import activities have completed, you should note the time required to complete the import of records and calculate the overall throughput (number of records imported per second).

Note: You may also want to track the time between data import operations.

Scale Up Import Volume

After you have established a baseline, you can increase the number of records in your input file and begin to run multiple imports concurrently. Scale the volumes in a controlled manner and note your throughput at every step.

Optimize Concurrent Import Activities

You can run multiple import activities simultaneously. This can improve your overall throughput versus serially running the same imports. The optimal number of concurrent import activities can vary across objects and use cases; you must perform testing prior to beginning your production data load to identify the most efficient data import plan.

You can run multiple data import activities concurrently by submitting a new import activity while the first activity is still being processed. CX Sales and Fusion Service processes both import activities without waiting for the first activity to complete before starting the second activity. You can continue to run multiple data import activities concurrently for additional data import activities.

For example, you first run a test to measure the throughput when importing 200,000 records using four serial activities of 50,000 records each. You may then run a test to import a total of 600,000 records as shown in this table:

Test Number	Total Number of Records	Number of Records per Activity	Number of Activities	Concurrency	Average Throughput
1	200,000	50,000	4	Serial	
2.1	100,000	50,000	2	Concurrent	
2.2	200,000	50,000	4	Concurrent	
2.3	300,000	50,000	6	Concurrent	

At every step, you should note the average throughput. If you reach a point where throughput is decreasing, then you may have exceeded your optimal concurrency. You may want to repeat the tests to ensure that you have sufficient data points to draw a correct conclusion.

You can import file attachments to some record types. Importing attachments impacts import performance and should be considered when planning your data import activities.

You can also adjust the data import based on the number of records in your input data file. For example, start with 25,000 records and increase by 25,000 records with every run. As you increase the number of records in each batch, note the average throughput. If you reach a point where throughput is decreasing, then you may have exceeded your optimal number of records. Oracle doesn't recommend importing more than 100,000 records in a single import activity and exceeding five concurrent import activities.

Pod Size

Significant changes to your usage patterns such as adding many new users or the execution of high volume data imports may change your pod sizing assessment. Ensure that your environment is properly sized to handle the import data volumes generated by your organization along with other operations that are performed by your users. Before starting a high volume import process or one time data load, you may want to have Oracle review your sizing. Contact Oracle help desk to start this review process.

How do I create a standalone resource?

You can import resource data from an external data source into Sales and Fusion Service using Import Management. You must create or import resources before you can associate them with resource organizations.

Before You Begin

The scenario in this example assumes that the following prerequisites have already been set up.

1. Employees must exist in the application.
2. User accounts and email IDs are set up for the already existing employees.
3. Appropriate business units are set up using the Manage Business Unit task.

To find the business unit, navigate to the following in the Setup and Maintenance work area:

- o Offering: Sales
- o Function Area: Data Import and Export
- o Task: Manage Business Units

4. Appropriate legal entities are set up using the Manage Legal Entities task.

To find the legal entity, navigate to the following in the Setup and Maintenance work area:

- o Offering: Sales
- o Function Area: Data Import and Export
- o Task: Manage Legal Entities

Scenario

In this scenario, Lina John is created as a SALES_REPRESENTATIVE. You must create a source file (CSV) with the attributes and import it using import management as shown in this table.

Attribute Name	Value
FirstName	Lina
LastName	John
UserName	LINA.JOHN@VISION.COM
ResourceEmail	lina.john@vision.com
BusinessUnit	Vision Corporation Enterprise
LegalEntity	Vision Corporation

Attribute Name	Value
IndividualRoleCode	SALES_REPRESENTATIVE

Note: To create a Sales Manager, specify SALES_MANAGER for the Individual Role Code attribute.

You can import the source data file.

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

Note: Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.
8. Navigate to **Resource Directory** and search for Lina in the Search section.

Related Topics

- [How do I import resource data?](#)
- [How do I import data?](#)
- [Schedule the Send Pending LDAP Requests Process](#)

How can I hide the contact address from the leads pages in classic UI?

Use Page Composer to hide the contact address in the Create Lead and Edit Lead pages in the classic UI. Here's how. You can't hide the address using Application Composer.

1. Create and enter a sandbox with Page Composer as the tool.
2. Open the page you want to configure: Create Lead or Edit Lead.
3. If you're editing the Create Lead pages, you must enter a lead name.
4. Open Page Composer from the sandbox **Tools** menu.
5. In the Page Composer menu bar, click the Select tab.
6. Click in the whole page component (the blue border around the whole page).
7. Click **Edit Component**.
8. In the Component Properties window, click **Children**.
9. Uncheck the **Contact Address** element.

How do I enable address verification and to avoid data conflicts between the Oracle Address, Email, and Phone Verification and master reference geography data?

You're a sales customer who doesn't use geographies for territory assignment or tax calculation and has purchased Oracle Account and Contact Enrichment by Dun and Bradstreet for data enrichment and the Oracle Address, Email, and Phone Verification for address verification.

To enable address verification and to avoid data conflicts between the Oracle Address, Email, and Phone Verification and master reference geography data you must do the following setups:

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

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

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

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

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

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

How do I configure the default Activity search?

You can configure the default set of records shown in Activity search by changing a lookup type. The lookup type order determines the order of the values in the Activity search Show filter.

The application uses the default search on the Activities landing page when it displays the initial list of activities to a user.

Users can go to the Activities tab from other application areas such as accounts, opportunities, and leads.

The available values for Activity default search are:

- Open Activities
- Completed Activities
- All Activities

Steps to Change the Default Activity Search

Here's how to change the default Activity search:

1. Navigate to the Setup and Maintenance work area.
2. Click the **Tasks** menu and click **Search**.
3. Search for the Manage Standard Lookups task and open it.
4. Search for the ORA_ZMM_ACTIVITY_FILTER_TYPE lookup type.
5. Use the **Display Sequence** column to specify the order of the default values according to the order in which you want them to appear in the Show filter.
6. Click **Save and Close**.

Note: You can't add, delete, or change the end date of values provided in the list.

Can I disable Global Search for specific roles, such as partner roles?

Search results depend on the data access granted to each user by their role and other factors, so partner roles don't see any results they aren't permitted to see. If you want to remove the Global Search box at the top of the page altogether, however, you can't remove it by role. You can either remove Global Search for everyone, or for specific users. To remove the Global Search box for specific users or for everyone, set the profile option Global Search Enabled (FUSION_APPS_SEARCH_ENABLED) using the Manage Administrator Profile Values task in Setup and Maintenance.

How do I reactivate a deleted resource?

You may want to reactivate a resource or activate a deleted resource by changing the end date.

Typically, a resource is end-dated when they have ended their primary work relationship with their employer or when they moved to another organization. To end date a resource, set a past date to the To Date of that resource in the Resource Directory.

For example, a resource works in a company for four years in sales and for the next two years they are moved to a sales role. You may want to track this resource as a separate resource. While auditing the reporting hierarchy or resources, we clearly know that this resource is a non-sales resource for two years. You can end date the resource when they move to a non-sales organization. During the period when a resource isn't a sales resource, they can't work on CX transactions. When the resource moves back to sales, you can reactivate the resource by removing the end date. Note that if we simply remove the end date on an existing end-dated resource, we can't explain why this resource wasn't assigned any transactions during the two year period. Removing the To Date from the resource makes it currently effective or active.

1. Navigate to Resource Directory.
2. Click **View Resources** in the **Tasks** region.
3. Search for a resource name using the Resource Name and Effective As-of Date field. The effective date is a date between the start date and end date of the resource.
4. Select the resource and click **Edit**.
5. Remove the To Date.
6. Click Save and Close.

You can now add the resource to a resource organization and also resource role, if needed.

What do I do when I get an error when running the Refresh Territories from Resources process?

If you receive the error "FND_CMN_SYS_ERR: An error occurred. Contact your help desk." when you run the Refresh Territories from Resources process, check that you've enabled a sales territory dimension. You must enable at least one territory dimension, even if you're not using any dimensions for assignment. Both the process and this one-time required setup apply to resource-centric territories, where each opportunity owner also owns their own territory. These are sales territories that you set up by enabling the Forecast by Opportunity Owner option in Setup Assistant or by using the Quick setup in the Forecasting functional area in Setup and Maintenance.

Here's how to enable a dimension. This is a one-time setup.

1. Open the task **Enable Dimensions and Metrics** from the Setup and Maintenance work area:
 - o Offering: Sales
 - o Functional Area: Territories
 - o 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 **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.

How can I track multiple emails for a contact?

While the contact overview displays only the primary email address, you can store and view multiple email addresses for each contact. For example, your contact may use both their work and private email addresses to communicate with you. You can save both and designate one of them as the primary. Here's how.

Multiple Email Addresses in the Redwood UI

- To view all of the email addresses for a contact, enter **Show** in the **Action Bar** and select **Show Email Addresses**.
- To add an address:
 - a. Enter **Add** in the **Action Bar** and select **Add Email Address**
 - b. In **Contact Preference**, indicate if the contact has agreed to be contacted or not using this email address. If you haven't determined their preference, then select **None**.
 - c. Select the email purpose (type), such as Home or Work.
 - d. You can enter a reason why the individual doesn't want to be contacted.
 - e. Specify if the new email is the primary email address. A primary address is the address that shows up in contact and account overviews and is automatically entered in outgoing emails.

Multiple Email Addresses in the Classic UI

If you're using the classic UI, here's how you can view and manage multiple email addresses:

1. Display the contact.
2. Click the **Profile** tab.
3. Next to **All Emails**, click **Edit** (the pencil icon).

Note: If the All Emails field isn't available, your administrator can add the field to the page layout using Application Composer.

4. In the Manage All Emails window, enter the email address, and specify the type.

Note: If your organization requires additional email types, your administrator can add them to the lookup type CONTACT_POINT_PURPOSE.

5. Indicate if the new email is the primary email address. A primary address is the address that shows up in contact and account overviews and is automatically entered in outgoing emails.

What can I use as a replacement for Oracle Social Network in Sales and CX Sales Mobile?

You can use Microsoft Teams as a replacement for the Oracle Social Network (OSN) in both the web sales application and in CX Sales Mobile. Microsoft Teams lets you collaborate across a range of internal teams, external partners, or suppliers. See *How do I integrate with Microsoft Teams?* for more details.

Tip: Oracle Social Network isn't available for use anymore and a sample solution has already been made available to help you integrate Fusion (FA) with Microsoft Teams. Follow the instructions on Oracle Support in article *End of Life (EOL) Details for Oracle Social Network - Fusion Applications Update 24C (Doc ID 2965583.1)*. The article includes a link to a sample solution that shows how to integrate Fusion Applications with Microsoft Teams.

How do I update employee information using import management?

You can update a resource by changing the resource information such as first name, last name, and email address. You can also update a resource with additional information such as fax number, phone number, middle name, and so on.

Note: End dated resources can't be updated using import or REST.

How to update the last name of a resource?

Vang Duffy is a Sales Manager in Sales and Fusion Service. You can view the resource details of Vang Duffy from the Resource Directory. From the Navigator, click **Resource Directory** and search for Vang Duffy in the Search section, his resource details appears as shown in this image.

Resource: Vang Duffy



ⓘ Usages

HR Employee

Registry ID

CDRM_98963

Manager

Ewing Yu

Job Title

Department

Organization

Mgr5Vision_Org

Roles

Sales Manager

Mail Stop

User

VANG.DUFFY@VISION.COM

Name

Phone

E-Mail

Vang.duffy@vision.com

Address

Time Zone

From Date

7/15/14

To Date

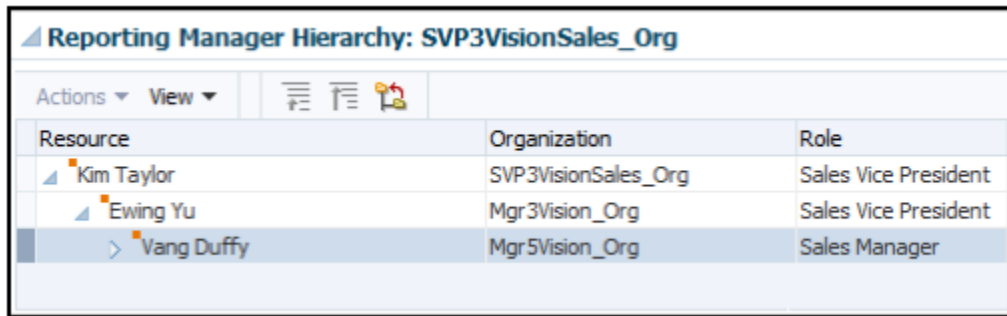
Upload

None

+

Picture

The reporting hierarchy and organization details of Vang Duffy are as follows:



Resource	Organization	Role
Kim Taylor	SVP3VisionSales_Org	Sales Vice President
Ewing Yu	Mgr3Vision_Org	Sales Vice President
Vang Duffy	Mgr5Vision_Org	Sales Manager

In this scenario, Vang Duffy changes his name to Vang Smith. To update Vang's last name, you must use the Resource Party Number and Last Name attributes in your source file. To update Vang's last name from Duffy to Smith, create a source file (CSV) with these attributes and import it using import management.

Attribute Name	Value
ResourcePartyNumber	Conta765976
LastName	Smith

You can import the source data file.

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

Note: Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

After running the import file, navigate to Resource Directory and search for Vang in the Search section. The resource details of Vang after the last name is updated appear as shown in this image:

Resource: Vang Smith



Usages HR Employee User VANG.DUFFY@VISION.COM

Registry ID CDRM_98963 Name

Manager Ewing Yu Phone

Job Title E-Mail Vang.duffy@vision.com

Department Address

Organization Mgr5Vision_Org Time Zone

Roles Sales Manager From Date 7/15/14

Mail Stop To Date

Upload None

Picture

Also, note that Vang's last name is updated in the reporting hierarchy.

Reporting Manager Hierarchy: Mgr3Vision_Org

Resource	Organization	Role
Ewing Yu	Mgr3Vision_Org	Sales Vice President
Vang Smith	Mgr5Vision_Org	Sales Manager

How to update the email address of a resource?

Rina Nash is a Sales Representative in Sales and Fusion Service. You can view the resource details of Rina Nash from the Resource Directory. From the Navigator, click Resource Directory and search for Rina Nash in the Search section. Rina's resource details are displayed.

In this scenario, Rina Nash changes her name to Rina Pinto Jacob after marriage. Rina not only wants to change her last name, but also wants to update her email ID and middle name.

To update Rina's last name, email address, and middle name, you must create a source file (CSV) with these attributes and import it using import management. However, in this scenario, to update Rina's email ID, you must provide the email address in your CSV file.

Attribute Name	Value
ResourcePartyNumber	Conta765976
ResourceEmail	rina.jacob@vision.com

You can import the source data file.

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

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

Note: Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.
8. Navigate to **Resource Directory** and search for Rina in the Search section.

Rina's email address will be updated and visible in the resource pages, such as the resource directory.

How to update the phone number of a resource?

Rina Nash is a Sales Representative in Sales and Fusion Service. You can view the resource details of Rina Nash from the Resource Directory. From the Navigator, click Resource Directory and search for Rina Nash in the Search section. Rina's resource details are displayed.

In this scenario, Rina Nash changes her name to Rina Pinto Jacob after marriage. Rina not only wants to change her last name, but also wants to update her work phone number and middle name.

To update Rina's last name, work phone number, and middle name, you must create a source file (CSV) with these attributes and import it using import management. However, in this scenario, to update Rina's phone number, you must provide the work phone country code and work phone number in your CSV file.

Attribute Name	Value
ResourcePartyNumber	Conta765976
WorkPhoneCountryCode	+1
RawWorkPhoneNumber	510-599-7487

You can import the source data file.

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

Note: Validation errors, if any, are displayed on the Mapping Validation screen. If you get warnings about unmapped columns, then you can ignore these columns and proceed to submit the import job. Validations are for informational purposes and applicable only for low-volume imports.

7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

8. Navigate to **Resource Directory** and search for Rina in the Search section.

Rina's email address is updated and visible in the resource pages, such as the resource directory.

How do I display the country in the address field?

By default, if the name of the country selected in the user profile and the name of the country in the address are the same, the country is not displayed on the address field of an account or contact.

For example, US is set as the country in your user profile and the billing address is also US, then the billing address is displayed without the country name US.

To see the country selected in the user profile go to User Profile and click **Set preferences > General Preferences > Regional > Territory**

You can change this behavior in the account and contact addresses using the Regional Country in Address Formats Included profile option.

Perform the following steps to change the profile option value:

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

If the profile value of the ORA_HZ_INCLUDE_REGIONAL_COUNTRY profile option is set to yes and the country name set in the user profile is the same as the country in the address, then the country name is displayed.

If the profile value of the ORA_HZ_INCLUDE_REGIONAL_COUNTRY profile option is set to no and the country name set in the user profile is the same as the country in the address, the country name isn't displayed.

4. Click **Save and Close**.

What fields can I audit for Sales?

Here are the fields you can audit in Oracle Sales:

Sales Objects Available for Auditing

Area	Parent Objects	Child Objects
Account and Contact Management	Account (Account Profile)	• Sales Account Profile ◦ Sales Account Resource ◦ Sales Account Territory • Address ◦ Address Purpose • Phone

Area	Parent Objects	Child Objects
		• Email • Instant Messaging • Web • Classification Assignment • Additional Account Name • Contact Preference • Usage Assignment • Additional Identifier • Source System References • Relationship ○ Customer Contact Profile
Account and Contact Management	Contact (Person Profile)	• Sales Account Profile ○ Sales Account Resource ○ Sales Account Territory • Contact Address ○ Address Purpose • Phone • Email • Instant Messaging • Web • Classification Assignment • Additional Contact Name • Contact Preference • Usage Assignment • Additional Identifier • Source System References • Relationship ○ Customer Contact Profile
Account and Contact Management	Household (Household Profile)	• Sales Account Profile ○ Sales Account Resource ○ Sales Account Territory • Address ○ Address Purpose • Phone • Email • Instant Messaging

Area	Parent Objects	Child Objects
		• Web • Classification Assignment • Additional Household Name • Contact Preference • Usage Assignment • Additional Identifier • Source System References • Relationship
Account and Contact Management	Resource (Resource Profile)	• Address ◦ Address Purpose ◦ Location SDO • Phone • Email • Instant Messaging • Web Page • Resource Organization Membership • Resource Role Assignment • Sales Representative Setup
Common Components	Activity	• Contacts • Resources
Contracts	Contract header	• Buy Contract Line • Project Contract Line • Sales Contract Line • Service Contract Line
Opportunities	Opportunity	• Opportunity Revenue • Opportunity Split Revenue • Opportunity Recurring Revenue • Opportunity Revenue Line Set • Opportunity Team Member • Opportunity Partner
Opportunity Revenue	Opportunity	• Forecast • Worst Case • Estimated Price • Product • Quantity • Discount

Area	Parent Objects	Child Objects
		• Amount • Line Currency • Revenue Type • TypeCodeSetId • Best Case • Win Probability • UOM • Product Group • Frequency • End By • End After • Recurring Quantity • Recurring Estimated • Recurring Revenue • Start Date • Status • StatusCodeSetId • Close Date • Win/Loss Reason • CloseReasonClodeSetId • Competitor • Include in Forecast • Recurring Worst Case • Recurring Best Case • Sales Channel • Partner • Recurring Expected Revenue • Additional Text 1 • Additional Text 2 • Additional Number 1 • Additional Amount 1 • Recurring Additional Number 1 • Recurring Additional Amount 1
Marketing	Leads	• Leads Product • Leads Resources • Leads Contacts • Leads Territories
Marketing	Budget	• Budget Entries

Area	Parent Objects	Child Objects
		Fund Requests
Partner Relationship Management	Partner	- Classification Assignment - Partner Type - Customer Contact Profile - Partner Certification - Expertise - Geographies Served - Industries Served - Product Specialties - Account Team - Address - Phone - Web - Email - Instant Messaging
Partner Relationship Management	Partner Program	- Program Benefit Details - Program Objective Details - Program Contract Templates
Partner Relationship Management	Partner Enrollment	- Enrollment Participants - Contract Enrollments
Sales Catalog	Product Group header	- Product Group - Product Group Product - Eligibility Rules - Product Group Relation - Product Group Attachments
Sales Catalog	Product header	- Product - Product Attachment
Territory Management	Sales Territory	- Sales Territory Resource - Sales Territory Line of Business - Sales Territory Coverage - Sales Territory Coverage Dimension - Sales Territory Coverage Dimension Value
Territory Management	Sales Territory Proposal	Sales Territory Proposal

Note: You can also audit custom objects that you create in Application Composer. On the Configure Business Object Attributes page, select **CRM Application Composer** from the Product list of values. You can then select either a top-level custom object or its child objects, or an intersection object that was created from a many-to-many relationship.

Steps to Enable Auditing in Sales

Here's how to enable audit history so that your users can see the change history of sales business objects:

1. Sign in as a setup user.
2. In the Setup and Maintenance area, use the search pane to search for the Manage Audit Policies task.
3. In the Manage Audit Policies page, click **Configure Business Object Attributes** in the **Oracle Fusion Applications** region.
4. Select appropriate business object or business object area from the list.
 - o For sales Accounts, Business Plans, Objects, or Quotes, select **CRM Common**.
 - o For sales Activities, select **Applications Common Components**.
 - o For Products and Product Groups, select **Sales Catalog**.
 - o For Opportunities, select **Sales**.
5. If necessary, select a child item from the list of objects in the Audit Name table.
6. Click the add icon in the Audited Attributes area.
7. Select the fields you want to audit.
8. Click **Save and Close**.

Note: Administrators must have the Manage Sales Audit Policies (FND_MANAGE_SALES_AUDIT_POLICIES_PRIV) privilege to do these steps.

Can I check what infrastructure is used by Sales to run the database?

No. Access to the identity of the infrastructure, core services, and applications used by Oracle Sales is strictly protected and can't be viewed for security reasons. Security is embedded in every layer of Sales to offer continuous and seamless protection.

How can I change an existing error message?

You can create messages and change predefined messages stored in the message dictionary. Here's how to edit a predefined message or a message that you created.

1. In the **Setup and Maintenance** work area, go to the **Manage Messages** task.
2. On the Manage Messages page, search for and select an existing message that you want to modify.
3. Click the **Edit** icon.
4. On the **Edit Message** page, change the existing details according to your specific requirements.

Note: Don't edit the message number for predefined messages.

5. Click **Save and Close**.

Can I add custom child object fields as columns in the Workspace list?

No. Adding custom fields or exposing fields from a child object as columns to the Workspace List UI isn't possible. You can only use custom fields for filtering the Workspace list results.

How can I restrict email notifications on weekends using Groovy?

You can write a Groovy script in Application Composer for your object that restricts email notifications from sending at the weekend (both Saturday and Sunday) to specified recipients.

Let's say you've scheduled a process to run daily to cater for the following condition: **If a Lead isn't updated from the last 7 days, then automatically trigger an email notification for the lead owner.**

To restrict the notification from being triggered on weekends, use the following sample code at the start of your script to get the day of the week and then use the condition to either run the rest of the code or skip it as follows.

```
def date = new Date()
Calendar calendar = Calendar.getInstance();
calendar.setTime(date);
def day = calendar.get(Calendar.DAY_OF_WEEK);
if (day == 7 || day == 1){ //1 is mapped to Sunday and 7 is mapped to Saturday
println('Do Nothing')
}
else{
//write the rest of the code that you want to run on weekdays
}
```

Note: Before you enable notifications for Sales, ensure that you've enabled notifications generally. For steps how to do this, see the topic, [Disable or Enable Workflow Notifications](#). If you update your sales application, be sure to go back and check these settings again.

What profile options do I need to set for qualifying leads?

You must set two profile options for lead qualification templates to specify what template name to display for the collection of questions, possible answers, and questionnaire feedback when you're qualifying leads.

Set these two profile options:

- MKL_LEAD_QUALIFICATION_TEMPLATE_PROFILE (Advanced Lead Qualification Enabled) for Direct Leads
- MKL_PARTNER_LEAD_QUALIFICATION_TEMPLATE (Advanced Lead Qualification Enabled) for Partner Leads

The qualification template used is based on the Sales Channel field. For example, if the Sales Channel is set to Direct, it will use the template specified in MKL_LEAD_QUALIFICATION_TEMPLATE_PROFILE. If the Sales Channel is set to Partner or is blank, it will use the template specified in MKL_PARTNER_LEAD_QUALIFICATION_TEMPLATE.

How can I prevent an opportunity I'm editing from being selected as a child Opportunity?

You can insert a Before Update trigger script on the Opportunity object. Here's an example:

```
if (ParentOpportunity_Id_c == OptyId){  
    throw new oracle.jbo.ValidationException('You can't set a Parent Opportunity as the same Opportunity  
you are editing.')
```

What do I do when the Synchronize CRM Search Indexes process is stuck or ends with an error?

To run the process, you must have the Customer Relationship Management Application Administrator job role or a custom job role with the privilege 'Run Search Index Scheduler' (ZCA_RUN_SEARCH_INDEX_SCHEDULER_PRIV).

This solution applies to the following error:

```
ESS-02001 User <user name> does not have execute permission on metadata object  
oracle.apps.ess.crmCommon.JobDefinition.SynchSearchContextIndexJob.
```

Here's how to fix the issue:

1. Assign the user the role Customer Relationship Management Application Administrator or add the privilege Run Search Index Scheduler (ZCA_RUN_SEARCH_INDEX_SCHEDULER_PRIV) to an existing job role.
2. Run scheduled process: Send Pending LDAP Requests
3. Run scheduled process: Import User and Role Application Security Data

4. Resubmit the process: Synchronize CRM Search Indexes

How do I auto generate billing account numbers?

You can automatically generate billing account numbers that begin from a certain number using the Manage Document Sequences task.

For example, you may have loaded legacy accounts with existing account numbers. You determine the maximum account number. You can then specify that any billing account that is newly created will be an increment of this maximum account number.

You must first set Customer Account Number Generation profile option (HZ_GENERATE_CUSTOMER_NUMBER) to Auto numbering, update not allowed. You then specify that the billing account numbers must be increments of the initial value, say, 32,100.

The initial value will take effect on newly created accounts.

1. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
2. Click the Tasks menu and click **Search**. Search for **Manage Administrator Profile Values** task and open it.
3. Search for the Party Number Generation profile option using the profile code HZ_GENERATE_CUSTOMER_NUMBER.
4. Set the value to Auto numbering, update not allowed at the site level.
5. Click **Save and Close**.
6. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
7. Click the Tasks menu and click **Search**. Search for Manage Document Sequences.
8. Expand the BILLING_ACCOUNT_NUMBER row and type the initial value. For example, you can type 32100.
9. Click **Save and Close**.

How do I auto generate party site numbers?

You can automatically generate party site numbers that begin from a certain number using the Manage Document Sequences task.

For example, you may have loaded legacy party site numbers with existing party site numbers. You determine the maximum party site number. You can then specify that any party site number that is newly created will be an increment of this maximum party site number.

You must first set Party Site Number Generation profile option (PARTY_SITE_NUMBER) to Auto numbering, update not allowed. You then specify that the party site numbers must be increments of the initial value, say, 22,102.

The initial value will take effect on newly created accounts.

1. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
2. Click the Tasks menu and click **Search**. Search for **Manage Administrator Profile Values** task and open it.
3. Search for the Party Number Generation profile option using the profile code PARTY_SITE_NUMBER.
4. Set the value to Auto numbering, update not allowed at the site level.
5. Click **Save and Close**.

6. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
7. Click the Tasks menu and click **Search**. Search for Manage Document Sequences.
8. Expand the PARTY_SITE_NUMBER row and type the initial value. For example, you can type 22,102.
9. Click **Save and Close**.

How do I auto generate contact numbers?

You can automatically generate contact numbers that begin from a certain number using the Manage Document Sequences task.

For example, you may have loaded legacy contact numbers with existing contact numbers. You determine the maximum contact number. You can then specify that any contact that is newly created will be an increment of this maximum account number.

You must first set Contact Number Generation profile option (HZ_GENERATE_CUSTOMER_NUMBER) to Auto numbering, update not allowed. You then specify that the contact numbers must be increments of the initial value, say, 32,100.

The initial value will take effect on newly created accounts.

1. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
2. Click the Tasks menu and click **Search**. Search for **Manage Administrator Profile Values** task and open it.
3. Search for the Party Number Generation profile option using the profile code HZ_GENERATE_CONTACT_NUMBER.
4. Set the value to Auto numbering, update not allowed at the site level.
5. Click **Save and Close**.
6. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
7. Click the Tasks menu and click **Search**. Search for Manage Document Sequences.
8. Expand the CONTACT_NUMBER row and type the initial value. For example, you can type 32100.
9. Click **Save and Close**.

How do I auto generate party numbers?

You can automatically generate party numbers that begin from a certain number using the Manage Document Sequences task.

For example, you may have loaded legacy party numbers with existing party numbers. You determine the maximum party number. You can then specify that any party number that is newly created will be an increment of this maximum party number.

You must first set Party Number Generation profile option (HZ_GENERATE_PARTY_NUMBER) to Auto numbering, update not allowed. You then specify that the billing account numbers must be increments of the initial value, say, 32,100.

The initial value will take effect on newly created accounts.

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

2. Click the Tasks menu and click **Search**. Search for **Manage Administrator Profile Values** task and open it.
3. Search for the Party Number Generation profile option using the profile code HZ_GENERATE_PARTY_NUMBER.
4. Set the value to Auto numbering, update not allowed at the site level.
5. Click **Save and Close**.
6. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
7. Click the Tasks menu and click **Search**. Search for Manage Document Sequences.
8. Expand the REGISTRY_ID row and type the initial value. For example, you can type 32100.
9. Click **Save and Close**.

How can I add new note types?

Here's how to add new note types for an object:

1. Navigate to Setup and Maintenance and search for the Manage Sales Note Type task.
2. Add a new row to the ZMM_NOTE_TYPE: Lookup Codes table.
3. Add the new lookup, check Enable, and enter a meaning and a description.
4. Save and close.
5. In Setup and Maintenance, go to the Manage Sales Note Type Mapping task.
6. In the Manage Sales Note Type Mapping page, select the business object, such as Sales Account.
7. In the Mapped Lookup Value field, select the lookup code you created earlier.
8. Select an end date if needed, and set the Default field to Y.

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:
 - o Redwood UX users have the following options:
 - Hourly
 - Daily
 - Weekly

- Monthly
- Yearly
- Record created
- Record deleted
- Attribute changed
- o 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.

Why don't I see any products and product groups when I try to add them to leads and opportunities?

If you don't see any products or product groups when you try to add them to leads or opportunities in Oracle Sales in the Redwood User Experience, the application administrator might not have enabled products and product groups for Adaptive Search.

Here's how a setup user can enable these and other objects for Adaptive Search:

1. In the Setup and Maintenance work area, open the Configure Adaptive Search task: Go to the **Sales offering > Sales Foundation functional area > Show: All Tasks > Configure Adaptive Search task**.
2. On the Configure Adaptive Search page, click the **Setup** tab.
3. On the Setup tab, **Quick** subtab, select **Product** and **Product Groups** and any other objects you might want to enable.
4. Click **Publish**.

Your action runs an indexing process and an hourly index refresh for the objects you selected. You can monitor the progress of the indexing process on the **Monitor** tab. The process can take several minutes to complete, depending on your data volume.

Can I set the CX Sales Mobile app to provide directions from Google Maps instead of Apple Maps on iPhones?

The Get Directions button uses the phone's native map application to guide salespeople to their destinations. So, if the native app is Apple Maps, you will get directions from Apple Maps. Try defaulting Google Maps on your phone and then refresh the CX Sales Mobile app.

Can I hide a country?

If your business isn't operating in a particular country, you may want to hide it.

You may want to hide a country from appearing in the list of countries, for example, while updating the address of a contact. This can be done in Manage Territories.

1. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
2. Click the Tasks menu and click **Search**. Search for **Manage Territories** and open it.
3. Search the country you want to hide using its Territory Code or Territory Name.
4. Clear the selection of the check box in the **Enabled** column.
5. Click **Save and Close**.

How do I verify email addresses and phone numbers?

You can verify email addresses and phone numbers in your application using the Oracle Address, Email, and Phone Verification service.

When your sales organization subscribes to the Oracle Address, Email, and Phone Verification service, you know right away if you entered an invalid phone number or email address.

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.

When a phone number or an email address is invalid for some reason, you get notified right under your entry. If nothing appears, the information is valid and you're good to go. Here's a screenshot of an invalid phone number to give you an idea of what you see under invalid information:

Callout Number	What You See
1	Status. For phone numbers, this can be only Invalid . Email addresses can also display the status of Partially-Valid : the domain is valid but the name isn't. 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 six months.
4	Overwrite button to manually set the status. The application, isn't perfect. If you know the number or email is correct, you can set the status to Verified . When you do, you see Overwritten on instead of Verified on .

The screenshot shows a 'Work Phone' input field. The field is divided into three parts: a dropdown menu showing '1', a text box containing '650', and another text box containing '4302000'. Below the input field, the text 'Invalid' is displayed in red, followed by 'Verified on 06/01/2018'. To the right of the verification date are two buttons: a circular arrow icon (labeled 3) and an equals sign icon (labeled 4). Callout number 1 points to the dropdown menu, callout number 2 points to the 'Invalid' status text, callout number 3 points to the 'Reverify' button, and callout number 4 points to the 'Overwrite' button.

Although the application doesn't display a Valid status for valid entries right away, you do eventually see it together with the date the information was verified. (How much later is in the control of the application administrator.) Why display the status at all? When the information is old, you or your colleagues might want to verify it again by clicking Reverify.

How to have different contact address fields depending on the country selected?

You must create different address fields using address formats depending on the country you selected.

To create an address style format:

- Specify the address style format and address style
- Create the format variation layout
- Assign a locale

In this example, we will create an address style to format Canadian postal addresses.

Create the Address Style Format Name and Specify the Address Style

To create an address style format and specify the address style:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Customer Data Management
 - o Functional Area: Trading Community Foundation
 - o Task: Manage Address Formats
2. On the Manage Address Formats page, click **Create** from the actions menu.
3. On the Create Address Style Format page, complete the fields in the Overview section, as shown in the following table.

Field	Value
Code	CA_POSTAL_ADDR
Name	Canadian Postal Address Format
Address Style	Postal Address
Default	No

4. Click **Save**.

Create the Format Variation Layout

To create a format variation layout:

1. In the Format section on the Create Address Style Format page, click the **Format Layout** tab.
2. In the Format Variation section, select **Add** from the Actions menu.
3. Enter a variation rank in the **Variation** field.

Note: You can't change the Variation Number. If you're specifying Create and Edit address forms, always use variation value as 1 irrespective of rank. If you're specifying Read Only formatted address (either single line or more than one line), always use variation with highest rank.

4. In the Format Variation Layout section, select **Add** from the Action menu.
5. Complete the fields as shown in the following table.

Field	Value
Line	1
Position	1

Field	Value
Prompt	Address line 1
Address Element	Address line 1
Required	Yes
Uppercase	No

6. Create another address line as shown in the following table.

Field	Value
Line	2
Position	2
Prompt	City
Address Element	City
Required	Yes
Uppercase	Yes

7. Click **Expand** on the City address line, then enter the value **1** in **Blank Lines Before**.
8. You can create as many address lines as you require. Click **Expand** if you want to enter blank lines and delimiters before, or after, an address line. In this section, you can also use the Attribute Transform Function to specify how the country attribute value must be displayed. The Attribute Transform Function supports two functions:
- `hz_format_pub.get_tl_territory_name(COUNTRY)`
 - `hz_format_pub.get_neu_country_code(COUNTRY)`

These functions are used only in display formats or read-only formats where the address data is formatted in a single field. Examples for such formats are overview pages and multiple addresses section in a list. Let's look at these functions in detail:

- `hz_format_pub.get_tl_territory_name(COUNTRY)`: Converts a country code of a country into its name. For example, MX is converted to Mexico. The country is displayed in the language that's set in the user

profile. If the profile value of the `ORA_HZ_INCLUDE_REGIONAL_COUNTRY` profile option is set to yes and the country name set in the user profile is the same as the country attribute value, then the country name is displayed. If the profile value of the `ORA_HZ_INCLUDE_REGIONAL_COUNTRY` profile option is set to no and the country name set in the user profile is the same as the country attribute value, the country name isn't displayed. To change the profile value, navigate to the following in the **Setup and Maintenance** work area:

- Offering: Sales
- Functional Area: Sales Foundation
- Task: Manage Administrator Profile Values
- o `hz_format_pub.get_neu_country_code(COUNTRY)`: Converts a country code for North European countries into a code that's placed before the postal code in a formatted address. For example, for France F is placed before the postal code. B is used for Belgium, D for Germany, and so on.

Note: For more information about territory codes and their prefix for North European postal codes, see Seeded Address Formats for Countries topic.

Note: While creating a new address style format, make sure that the transform function is present for each component as in predefined address style formats. The transform function may impact translation.

Assign a Locale

An address style format is assigned to a geographic location. Locale provides mapping between `territory_code` and address style format.

To assign an address style format to a locale:

1. In the Format section on the Create Address Style Format page, click the **Locale Assignment** tab.
2. Select **New** from the Actions menu.
3. Select the country for the address style format. You can assign multiple countries to the format.
4. Click **Save and Close**.

Related Topics

- [How can I create an address style format layout?](#)
- [How can I create a variation of an Address Style Format?](#)

How do I undo enrichment of an enriched account?

In certain scenarios, you may have to undo enrichment of a Dun & Bradstreet (D&B) enriched account and associate it again with Oracle Account and Contact Enrichment by Dun & Bradstreet to get the right updates for your account.

Let's see some examples:

- In the UK, when a private limited company goes public, D&B creates a new company record with a fresh DUNS number, and it obsoletes the old DUNS number and records of the company. In such a case, you have to restart the enrichment to get the latest updates for your account.
- In a rare case, enrichment can result in an incorrect operation and a Sales account is updated with incorrect D&B company data.

In such cases, you can undo the existing enrichment and redo it so that right data is updated in the Sales account records. Here's how you undo enrichment:

1. Go to **Navigator > Sales > Accounts**.
2. Select a D&B enriched account you don't want to enrich any longer.
3. On the Accounts page, click **Actions** and select **Undo Enrichment**.
4. Save your changes.

Note:

- After undoing the enrichment, your account unlinks from D&B, but the old data remains. Redo the enrichment so that the latest data from D&B replaces the old data.
- The enrichment sync jobs won't run for accounts unlinked from enrichment.

Why should I use the Maintain Party and Location Current Record Information process?

You can use this Maintain Party and Location Current Record scheduled process to sync worker records in Human Capital Management (HCM) to person parties and to update the current profile record for people, organizations, and locations based on today's date.

Syncing worker records to person party records helps in managing applications such as HR Help Desk, HCM Payroll, Expense, and so on. This scheduled process creates or updates person party records with party usage of HR_EMPLOYEE or HR_CONTINGENT_WORKER that are defined as workers in HCM such as pending worker, employee, contingent worker, nonworkers, and so on. This scheduled process updates person party records with party usage of HR_EMPLOYEE or HR_CONTINGENT_WORKER that are defined in HCM as canceled hire or purged worker.

In HCM, active workers are workers who are continuing in the organization. For example, employee and contingent worker. Future workers are workers who aren't currently part of the organization. For example, pending worker.

This scheduled process works in two modes:

- Normal Mode: All the person types listed in the table below except for employee and contingent worker who were hired in the past or current date are synchronized.
- Full Mode: Employee and contingent worker who were hired in the past or current date are synchronized in addition to the person types processed in the normal mode.

The following table lists the person types that are supported for synchronization in this scheduled process:

List of person types supported for synchronization in this scheduled process

Person Type	Hire Date	Sync in Normal Mode	Sync in Full Mode
Employee	Past Date/ Current Date	No	Yes
Employee	Future Date	Yes	Yes
Contingent Worker	Past Date/ Current Date	No	Yes

Person Type	Hire Date	Sync in Normal Mode	Sync in Full Mode
Contingent Worker	Future Date	Yes	Yes
Pending Worker	Past Date/Current Date /Future Date	Yes	Yes
Nonworker	Past Date/Current Date /Future Date	Yes	Yes
Ex-Employee	Past Date/Current Date /Future Date	Yes	Yes
Ex-Contingent Worker	Past Date/Current Date /Future Date	Yes	Yes
Ex-Pending Worker	Past Date/Current Date /Future Date	Yes	Yes
Ex-Nonworker	Past Date/Current Date /Future Date	Yes	Yes
Purged Worker	Past Date/ Current Date	Yes	Yes

Prerequisites

This scheduled process syncs active workers only when the profile option Enable Current Active Worker Sync For MPLCRI Job (ORA_HZ_ENABLE_MPLCRI_ACTIVE_WORKER) is set to yes (Y), and HRC_DISABLE_HCM_EVENTS_PROCESSING profile option is set to yes. This setting is named as Full mode. When the HRC_DISABLE_HCM_EVENTS_PROCESSING profile option is set to yes, Change Person Details events aren't published. Therefore, both the profile options (ORA_HZ_ENABLE_MPLCRI_ACTIVE_WORKER and HRC_DISABLE_HCM_EVENTS_PROCESSING) must be set to yes to avoid creating duplicate person parties while syncing active HCM worker records.

The following table displays the profile options and their values in both the modes:

This table displays the profile options and their values in both the modes

Profile Option	Normal Mode	Full Mode
ORA_HZ_ENABLE_MPLCRI_ACTIVE_WORKER	No	Yes
HRC_DISABLE_HCM_EVENTS_PROCESSING	N	Y

Note: Setting the HRC_DISABLE_HCM_EVENTS_PROCESSING to yes turns off all HCM events. This is very risky because this setting can break business flows that consume HCM events. So, ensure that this profile option is set to yes only during very short periods of time.

This setting is only applicable to active workers and not applicable to other person records such as nonworkers, contingent workers, and so on.

When to Use

This scheduled process is used to:

- De-normalize the future dated current location profile, party sites, and contact points based on today's date with extended support to future end-dated records.
- Create a party record for a Human Capital Management person record, if the party doesn't exist.
- Synchronize the first name, middle name, the last name, the title of the person, work phone, and work email attributes of the person records.
- When you purge the employee record of a purged worker, run this scheduled process to purge the corresponding person details. This scheduled process end dates the person usage assignment and synchronizes the deleted details of the purged worker.

Note: Party usage dates aren't synced during update. In other words, if an employee quits or is terminated (in HCM) and this scheduled process is executed, the party usage assignment isn't end dated. So, if an employee quits or is terminated from work, the person party record is still available. If phone number or email is deleted in HCM and this scheduled process is run, the corresponding person record's phone number or email is deleted.

Privileges Required

Verify that you have the following privileges or roles:

- Application Implementation Consultant
- Master Data Management Application Administrator

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
 - When there is a requirement to create or update worker records as person parties to complete business flows such as setting up direct payment methods, then run this scheduled process.
 - The scheduled process can be run when HCM workers are created or updated from HCM interfaces like HDL loader and then to sync workers into person parties.
- Compatibility:
 - This scheduled process is self-incompatible. If multiple instances are submitted, the first instance runs, and subsequent instances remain in Wait status.
 - Ensure that you don't schedule this process and the Synchronize Person Records process at the same time.

Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	None
Synchronization Type	Optional	Specify the object to be synchronized. You can specify Worker (HR Persons) or Party and location (De-normalize Parties). If you don't select anything, both objects are synchronized.	• Party and location • Worker	Not applicable	None
Person Type	Optional	Specify the type of person records to be synchronized.	• Ex-Nonworker • Nonworker • Employee • Pending Worker • Ex-Employee • Ex-Pending Worker • Ex-Contingent Worker • Contingent Worker • Purged Worker	Synchronization Type must be Worker.	None
From Date	Optional	Specify the from date in the date range during which employee records were created or updated.	Select a date.	Synchronization Type must be Worker.	None
To Date	Optional	Specify the to date in the date range during which the employee records were created or updated.	Select a date.	Synchronization Type must be Worker.	None
Person Number	Optional	Specify the person number to be synchronized.	Specify a valid person number.	Synchronization Type must be Worker.	None

How do I import Non-Oracle Licensed geography data?

You can use Import Management to create Geography data. It's recommended to use import management if you're importing Non-Oracle Licensed geography data or while loading your own geography from other vendors. You can also add alternate name or code to existing geographies with import. For more information see *Can you provide an example of importing geography data?*.

To import Geography data, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

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

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

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

Before You Start

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

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

Required Attributes and Validations for the Geography Object

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

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Geography Record
CountryCode	The code of the country to which the geography belongs.	This is validated against the country structure to check if the structure is defined for this country.	Required
PrimaryGeographyName	The primary name of the geography.	This is validated against the name of country if geography type is 'Country' or LevelNumber is 1.	Required
RecordTypeCode	The record type code that represents the intent of the import data. The values are:	No Validation	Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Geography Record
	0 - indicates the geography that already exists in the base table. 1 - indicates the intent to create a new geography. 2 - indicates the intent to add an alternate identifying name or code to an existing geography.		
LevelNumber	The level number of the geography in the hierarchy. For example, Country is at Level 1 and State (California) is at Level 2.	The level should exist in the country structure.	Required
SourceID	The source ID for the geography, along with the parent source ID is used to identify the geography parent and child relationship within the source file data and the interface table data.	None	Required
ParentSourceID	The parent source ID for the geography, along with the source ID is used to identify the geography's parent and child relationship with records within the source file data. This should be null for the country record, as Country is at the top of the hierarchy.	None	Required

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

Note: Keep a note of the following:

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

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

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

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

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

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [Import Your Country Structure Data](#)
- [Example of Importing Country Structure Data](#)
- [Can you provide an example of importing geography data?](#)

How do I purge inactive data?

You can purge inactive data or records that you no longer need using the Purge Inactive Party Records scheduled process. This scheduled process reads the configuration information such as age of inactive record and filter criteria. It then purges parent and child records that meet the filter criteria.

When to Use

You can use this scheduled process to purge sales contact, sales household, or sales account information that meet the specified filter criteria.

Note that only inactive records that are available in the sales context can be purged. For example, an inactive Partner record can't be purged because Partner isn't related to Sales. Only inactive and related merged sales accounts, sales contacts, and sales households which have no dual usage, or any additional usage (more than one usage) can be purged. Examples of inactive contacts, accounts, or households with dual usage are:

- contact which is also a supplier contact
- sales account which also has billing account usage

The following sales contact record types are supported:

- CONTACT
- ORG_CONTACT
- CUSTOMER_CONTACT
- SALES_PROSPECT
- SALES_ACCOUNT

The following sales account record types are supported:

- SALES_PROSPECT
- SALES_ACCOUNT

Also, along with the purge of the inactive accounts, households, or contacts, references of these purged records, such as identifier or name, are also removed in other applications like opportunities, leads, campaigns, territories, assets, deals, quotes, activities (tasks and appointments), notes, forecasts, business plans, and contracts. For these flows, purged accounts and contacts don't appear on application pages, web service responses, and BI reports.

Merged records can be purged only when the master (survivor) party becomes inactive.

Purge account, contact, and household records in the following situations:

- Purge Inactive Sales Accounts and contacts to comply with General Data Protection Regulations (GDPR).
- Cleanup data because incorrect data was created that's no longer needed.
- In some rare cases, cleanup of data maybe required to improve performance of the application.

Privileges Required

Verify that you have the following privileges or role:

- Privilege
 - ORA_ZBS_SALES_ADMINISTRATOR_JOB
- Role
 - Sales Administrator

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
 - You can run this scheduled process on need basis or schedule it for appropriate frequency, such as daily once.
- Execution Time
 - The execution time for a single data record is 1 to 2 minutes.
 - The execution time for a batch job or certain volume of data say 10k is around 1 hours 30 minutes to 2hours.
- Compatibility
 - This scheduled process is incompatible with itself and any other scheduled process.
 - There are no processes that must be run after running this process.

Parameters

Parameter	Optional or Mandatory	Parameter Values	Description	Special Combinations Required	Notes
Name	Mandatory	Sales Contact Sales Account	Purges inactive records that meet the filter criteria. For more information about specifying the filter criteria, see the Related Topics section.	No	N/A
Execution Mode	Mandatory	Regular mode for party purge Exception mode for party purge clean up	Sales accounts and sales contacts may be referred in other applications. Examples of such references are identifier or name in applications like opportunities, leads,	No	N/A

Parameter	Optional or Mandatory	Parameter Values	Description	Special Combinations Required	Notes
			campaigns, territories, and so on. In Regular mode for party purge, the references of inactive party records based on the currently specified filter criteria are removed. In Exception mode for party purge clean up, the references of any party which no longer exists in addition to the references identified in the regular mode are removed. We recommend that you use the Exception mode with caution. Use this mode only when references exists of inactive records in other applications like opportunities, leads, campaigns, territories, assets, deals, quotes, activities (tasks and appointments), notes, forecasts, business plans, and contracts and the corresponding Party Record is purged.		

Troubleshooting Information

You are notified about the scheduled process completion when scheduled process is successful.

Related Topics

- [Purge Inactive Data](#)

How do I add a geography to the geography hierarchy?

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

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

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

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

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

How do I define set attribute value rules?

This example demonstrates how to create a survivorship rule of the type Set Attribute Value.

You can determine survivorship at the attribute level using the set attribute value survivorship rule type. Set attribute value rules are used in party merge to determine which attribute value should come from which record.

The input to the survivorship rule is given in the IF clause. In a set attribute value rule, the inputs are the party records and their source information. The source information contains information about all attributes for each record in the database. If you're creating rules that use the Source information VO, you define it in the Define Source Systems Confidence page of the Manage Source System Confidence task. You must map each attribute to its source system and given a Source Confidence score on a scale of 1 to 100.

The following table lists the attributes in the source information VO to create a set attribute value rule.

Attribute Name	Description
RecordId	The record ID of a specific attribute.
AttributeName	The name of the attribute.
Source	The source system from where the attribute is updated.
SourceConfidenceLevel	The source confidence level assigned to the source system.
SourceUpdateDate	The date when the attribute was last updated.

Attribute Name	Description

The THEN clause determines the output object that picks the master record. In this case, setAttribute function creates the output object. To create Set Attribute Value rules, you perform the following steps:

1. Navigate to the Manage Survivorship Rules task.
2. Click Add. The Create Survivorship Rule page appears.

Tip: You can select attributes from the available attributes in the Create Survivorship Rule page. It pre-populates the rule template with the selected attributes. It's not mandatory to set attributes from the available attribute.

3. Enter the sample information provided in the following table on the Create Survivorship Rule page.

Field	Value
Rule Name	PickAttributeValueRule
Description	Select the master value for a specific attribute based on specified master selection criteria.
Select the master value for a specific attribute based on specified master selection criteria.	Set attribute value
Object Type	Organization
Template	Select the Attribute Based template to select the surviving value based on the characteristic of the attributes. For example, you need an Attribute Based template to pick an attribute with the highest or lowest value such as a party number, or salary, or the earliest incorporated year. Select the Source Confidence Based template to select the surviving value based on the confidence in the source information.

4. Select attributes from the available attributes to pre-populate the rules template. In case you want to use the predefined set attribute rules, don't select any attributes.
5. Click Apply. You're taken to the Define Survivorship Rules: Select Attribute Value page.

In the Define Survivorship Rules: Select Attribute Value page, you specify criteria for selecting the master attribute value. The criteria that you define in this page determine the feature of the rule. You also have the option of using one of the following three predefined templates:

- Highest Source Confidence Level Wins for Organization (or Person): Use this rule to select the attribute values with the highest source confidence level.
- Most recently updated Organization (or person) attribute: Use this rule to select the attribute values with the most recently updated date.
- Least recently updated Organization (or person) attribute: Use this rule to select the attribute values with the oldest updated date.

The following sections of this topic contain three worked examples that show different ways of manually setting master attribute values in the Define Survivorship Rules: Select Attribute Value page. They are as follows:

- Set the Values with the Earliest Update Date as the Surviving Attribute Values
- Set the Value with the Highest Source Confidence Level as the Surviving Attribute Value for D-U-N-S Number
- Set the Values with the Earliest Incorporated Year as the Surviving Attribute Values

How You Set the Values with the Earliest Update Date as Surviving Attribute Values

This rule has a single condition to set all the surviving attribute values based on the earliest update date. The following is a use case for a set attribute rule to select the values with the earliest update date as surviving attribute values:

Use Case 1

Party Record

The following table contains information for party records.

Record Name	Party ID	Party Name	D-U-N-S Number
Record 1	1	Oracle Corp	198837472
Record 2	2	Oracle USA Corp	489203901
Record 3	3	Oracle	null

Source Information

The following table contains information for source information records.

Record ID	Attribute Name	Source	Source Confidence Level	Source Update Date
1	Party Name	FUSION	95	1/5/2016
2	Party Name	FUSION	95	1/5/2010
3	Party Name	SIEBEL	90	1/5/2000
1	D-U-N-S Number	DNB	100	2/5/1990
2	D-U-N-S Number	FUSION	95	1/5/2016

In this case:

- The D-U-N-S number attribute value from the record with ID 1 is selected as master because the source information indicates that it has the earliest source update date.

- The Party Name attribute value from the record with the ID 3 is selected as master because the source information indicates that it has the earliest source update date.

Populate the Define Survivorship Rules: Select Attribute Values page with the IF and THEN rules condition values provided in the following table.

Rule Condition	Value
IF Condition	<pre>IF picked attribute is a AttributeSourceInfoVO and there is no case where { Other Attribute == AttributeSourceInfoVO and there is no case where Other Attribute is a AttributeSourceInfoVO Picked Attribute.AttributeName is OtherAttributeName and PickedAttribute.RecordId isn't Other Attribute.recordId and Picked Attribute.SourceUpdateDate more than OtherAttribute.SourceUpdateDate}</pre>
THEN Condition	<pre>THEN call setAttribute (picked attribute.AttributeName, Picked Attribute.RecordId)</pre>

The following figure displays the Define Survivorship Rules: Select Attribute Values page with the IF and THEN rules conditions to create the set attribute value rule that selects the values with the earliest source update date as the surviving attribute value. The figure provides the following details. Name of the rule: History Wins
IF condition: If picked attribute is a AttributeSourceInfoVO and there is no case where {Other Attribute is AttributeSourceInfoVO and Picked Attribute.AttributeName is Other Attribute.AttributeName and PickedAttribute.RecordId isn't Other Attribute.RecordId and Picked Attribute.SourceUpdateDate more than Other

Attribute.SourceUpdateDate}THEN condition: Then call setAttribute (Picked Attribute.AttributeName, Picked

Define Survivorship Rules: Select Attribute Value

Select Attribute Value

View IF/THEN Rules + 1-1 of 3

+ X Up Down Scissors

History Wins

IF

Picked Attribute is a AttributeSourceInfoVO + X Up Down Scissors Settings

+ Add Test

and

there is no case where { + X Up Down Scissors Settings

Other Attribute is a AttributeSourceInfoVO and + X Up Down Scissors Settings

↑ ↓ Scissors Settings

Picked Attribute.AttributeName is Other Attribute.AttributeName and

Picked Attribute.RecordId isn't Other Attribute.RecordId and

Picked Attribute.SourceUpdateDate more than Other Attribute.SourceUpdateDate

}

+ Add Test

THEN

+ X Up Down Scissors

call setAttribute (Picked Attribute.AttributeName, Picked Attribute.RecordId)

Attribute.RecordId)

How You Set the Value with the Highest Source System Confidence Level as the Surviving Attribute Value for D-U-N-S Number

This rule has a single condition to select the D-U-N-S number value with the highest source confidence level as the surviving attribute value for the D-U-N-S number attribute. The following is a use case for a set attribute rule to select the D-U-N-S number value with the highest source confidence level as the surviving attribute value:

Use Case

Party Record

The following table contains information for party records.

Record Name	Party ID	Party Name	D-U-N-S Number
Record 1	1	Oracle Corp	198837472
Record 2	2	Oracle USA Corp	489203901

ORACLE

225

Record Name	Party ID	Party Name	D-U-N-S Number
Record 3	3	Oracle	null

In this case, the party record contains three records with the attribute Party Name and two records with D-U-N-S number. These attributes are picked to create the source information. The source information table defined using the attributes from this party record table is as follows:

Source Information

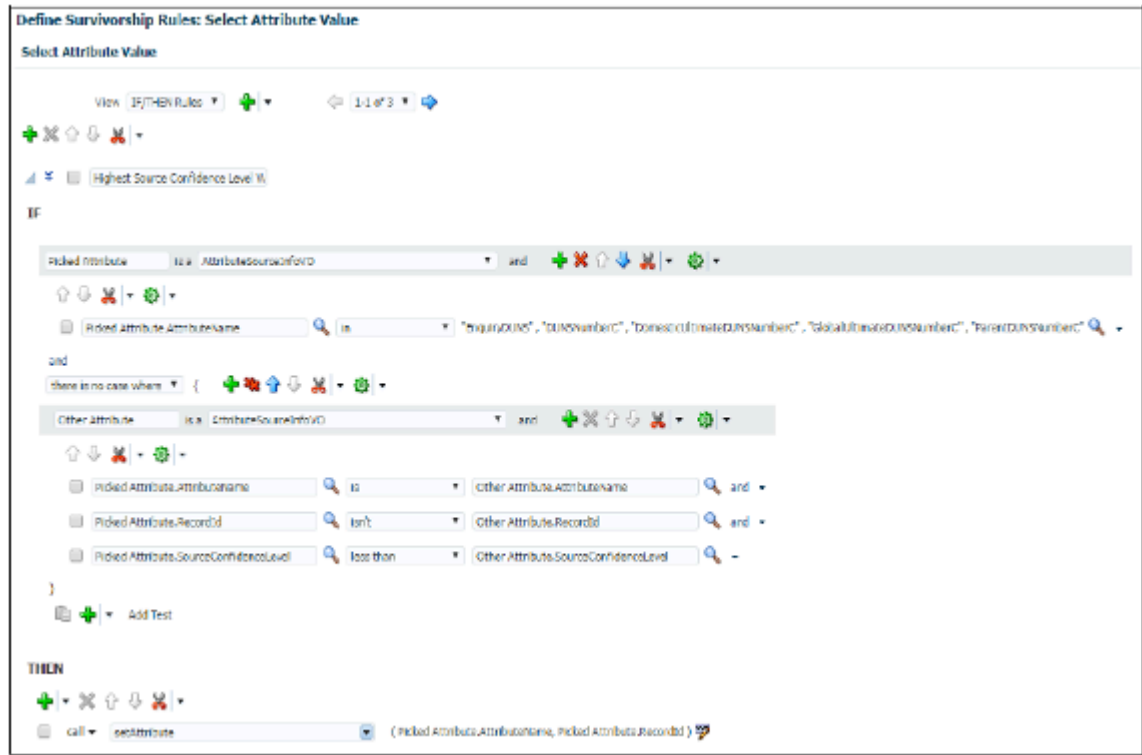
The following table contains information for source information records.

Record ID	Attribute Name	Source	Source Confidence Level	Source Update Date
1	Party Name	FUSION	95	1/5/2016
2	Party Name	FUSION	95	1/5/2010
3	Party Name	SIEBEL	90	1/5/2000
1	D-U-N-S Number	DNB	100	2/5/1990
2	D-U-N-S Number	FUSION	95	1/5/2016

In this case, the D-U-N-S attribute value for the record with ID 1 is selected as master because the source information indicates that it has the highest source confidence level among all records that have the D-U-N-S Number attribute.

The following figure displays Define Survivorship Rules: Select Attribute Values page with the IF and THEN rules condition values to set the attribute value with the highest source system confidence level as the master. The figure provides the following details. Name of the rule: Highest Source Confidence Level IF condition: If picked attribute is a AttributeSourceInfoVO and Picked Attribute.AttributeName is EnquireDUNSNumberC and there is no case where {Other Attribute is a AttributeSourceInfoVO and Picked Attribute.AttributeName is Other Attribute.AttributeName and Picked Attribute.RecordId isn't Other Attribute.RecordId and Picked Attribute.SourceConfidenceLevel is less than

OtherAttribute.SourceConfidenceLevel}THEN condition: Then call setAttribute (Picked attribute.AttributeName, Picked



Attribute.RecordId)

How You Set the Values with the Earliest Incorporated Year as the Surviving Attribute Values

This rule has a single condition to select values with the earliest incorporated year as the surviving attribute values. The following is a use case for creating such a set attribute value rule:

Use Case 1

Party Record

The following table contains information for party records.

Record Name	Party ID	Party Name	Incorporated Year
Record 1	1	Oracle Corp	1980
Record 2	2	Oracle USA Corp	1990
Record 3	3	Oracle	2000

In this case, the party record table contains three records with the attributes Party Name, Party ID, and Incorporated Year. The attribute values for the record with the earliest incorporated year are picked as master attribute values.

The following figure displays Define Survivorship Rules: Select Attribute Values page with the IF and THEN condition values to set the attribute with the earliest incorporated year as the master. The figure provides the

following details. Name of the rule: Selecting the Earliest Incorporated Year
IF condition: If for each case where org is a OrganizationDVO and org.IncorpYear isn't null and there is no case where another org is a OrganizationDVO and org.PartyId isn't another org.PartyId and another org.IncorpYear isn't null and org.IncorpYear.intValue() is more than another org.incorpyear.intValue() THEN condition: Then call setAttribute ("IncorpYear", org.PartyId)

Define Survivorship Rules: Select Attribute Value

Select Attribute Value

View IF/THEN Rules + 1-1 of 4

+ ✕ ⬆ ⬇ ✂

⚙ Selecting the earliest Incorporated

IF

(for each case where) { + ✕ ⬆ ⬇ ✂ ⚙

org is a OrganizationDVO and + ✕ ⬆ ⬇ ✂ ⚙

⬆ ⬇ ✂ ⚙

org.IncorpYear isn't null

}

⬆ + Add Test

and

there is no case where { + ✕ ⬆ ⬇ ✂ ⚙

another org is a OrganizationDVO and + ✕ ⬆ ⬇ ✂ ⚙

⬆ ⬇ ✂ ⚙

org.PartyId isn't another org.PartyId and

another org.IncorpYear isn't null and

org.IncorpYear.intValue() more than another org.incorpyear.intValue()

}

⬆ + Add Test

THEN

+ ✕ ⬆ ⬇ ✂

call setAttribute ("IncorpYear", org.PartyId)

How do I override system mapping?

You can override system mapping for merge requests by manually modifying it. To manually modify system mapping, you must select the master record and its associated attributes, and then specify the resolution for the child entity conflicts and errors.

You can resolve child entity conflicts and errors by merging, transferring, or removing the record attributes.

You can override system mapping using these steps:

1. Navigate to the Duplicate Resolution work area as follows: **Navigator** > **Customer Data Management** > **Duplicate Resolution**.

2. Select the duplicate resolution request for which you want to override system mappings and drill down through the request ID to the **Review Merge Request** page.

Note: You can override system mappings only for those merge requests that are in New status, which indicates that the request is open for review and processing. The status depends on the following:

- The merge request isn't an auto-merge request and the profile option ZCH_USER_MERGE_REQUESTS is set to Process Subject to Approval. For more information about this profile option, see Customer Hub Profile Options topic listed in the Related Links section.
- Your administrator has run the Run Request Dispatch Job from the Setup and Maintenance area to change the merge request status from Pending to New. A request dispatcher is run periodically for pending merge requests, and sets the status of pending requests to New. You can also request your administrator to run the Run Request Dispatch Job from the Setup and Maintenance area to set the status of the pending requests to new. A setup user can access this task in the Setup and Maintenance work area, using the following:
 - Offering: Customer Data Management
 - Functional Area: Customer Hub
 - Task: Run Request Dispatch Job

3. Click **Override** on the **Review Merge Request** page to view the **Override System Mapping: Select Master Record** page.
4. In the duplicate set on the page, select the record that you want to make the master and click **Set Master**.

Optionally, you can also remove records from the duplicate set to prevent them from being merged. You can also mark the removed record as a nonduplicate to exclude it from all the subsequent merge requests.

5. Click **Next** to navigate to the **Override System Mapping: Map Profile Attributes** page.
6. Select a value from any of the duplicate records for each profile attribute to be retained in the master record.

If the number of duplicate records is five or less than five, you can select the value from the record columns. If the number of duplicate records is greater than five, you can select the value from the value choice list. In the profile attribute value choice list, you can hover over the value to see the attribute value's record. This helps you associate the correct value with the master record. You can also manually enter a new value in the **Final Value** column for an attribute.

7. On the **Override System Mapping: Map Entities** page, you can merge two or more entities into a single entity. You can also remove merge entities, such as addresses, from the merge processes by clicking the Remove icon. If the Remove icon isn't available, you must enable the ORA_ZCH_ALLOW_REMOVE_FEATURE profile option. For more information about creating this profile option, see the Enable the Remove Option on the Override System Mapping UI section in this topic. Child entities associated with the entities that are removed using the Remove icon won't be transferred to the master record.
8. Click **Next** to view the **Override System Mapping: Review** page. Now you can review the mapping settings and click Submit to override the default system mappings. In case there are edits, click Back to make updates to the mapping settings before submission.

Enable the Remove Option on the Override System Mapping UI

You can enable the Remove icon on the Override System Mapping UI by enabling the profile option `ORA_ZCH_ALLOW_REMOVE_FEATURE` by setting its value to Yes as follows:

1. Sign in as a setup user such as, Sales Administrator, Master Data Management Application Administrator, or Application Implementation Consultant.
2. Click **Navigator** > **Setup and Maintenance** work area.
3. Click the Tasks menu and click **Search**. Search for **Manage Administrator Profile Values** task and open it.
4. Search for the Profile Option `ORA_ZCH_ALLOW_REMOVE_FEATURE`.
5. Click Actions, New in the `ORA_ZCH_ALLOW_REMOVE_FEATURE`: Profile Values area.
6. Select **Site** as the profile level and **Y** as the profile value.
7. Click **Save and Close**.

How do I remove a party from duplicate resolution request?

Removing a party from a duplicate resolution request doesn't automatically modify attribute level mappings of the request. If you want to manually remove parties from a merge request, you must either manually select the values that have to be removed from the 'Map Profile Attributes' page, or reprocess the merge request after removing the party using the following steps:

1. Remove a party from a duplicate resolution request as described in the beginning of this topic and click **Save and Close**.
2. Select the merge request and click **Reset**.
3. Select the merge request and click **Dispatch** to run the dispatch job once again.

Related Topics

- [Customer Hub Profile Options](#)

Master Record Selection Setting

Controls the method used to identify which record in a duplicate set becomes the master during a merge.

The options are:

- Select master record using survivorship rule: Logic configured with Oracle business rules using the Manage Survivorship Rules setup task determines the master.
- Select the oldest record as master: The record with the earliest creation date is the master.
- Select the latest record as master: With the most recent creation date is the master.
- Select master based on duplicate identification results: Internal logic of the duplication identification process determines the master.
- Select master record using Data Quality Rules: Logic configured with Application Composer Data Quality Rules determines the master.

Consider these points:

- The Select the older record as master and Select the latest record as master options use optimized internal processes and may offer the best performance.

- Master Record Selection can't be survivorship rule or Data Quality Rules if the Merge Scope has been set to Customer data management specific areas with restrictions.
- The Duplicate Identification batch process identifies a preliminary master record, but the final determination of master record occurs within duplicate resolution processing per the Master Record Selection Setting. Select the Select master based on duplicate identification results option if you want to retain the master record selection from the duplicate identification results.

Note: If the creation date value is exactly same for the records, then the party with the lowest party ID is chosen as the master record.

How can I search for an account by any of the words in the name when creating an opportunity?

Sales in the Redwood user experience provides you with the fastest way of searching using any of the words in an account name when you're creating an opportunity. Just place your cursor in the Account field to see the most frequently used accounts. If the suggestions don't match what you're looking for, enter any of the words in the name. You can also search for the account using the contact name, city, or other related information. You can also search by a combination of attributes, such as a word in the name and the city where the account is located.

If you're creating an opportunity in the classic Sales UI, you must click Search in the Account field drop-down list and then select the contains operator for the account name to be able to search by any of the words in the account name.

How do I manage export objects?

Export objects correlate with tables in Oracle Applications Cloud. Understand export objects and their attributes to manage the data that you want to export.

Supported Objects

You can export these objects and their child objects using Export Management:

- Access Groups
- Account
- Action
- Action Plan
- Activity
- Asset
- Assignment Rule Candidate
- Assignment Rule Condition
- Assignment Rule
- Assignment Rule Set

- Billing Contract Milestone
- Business Plan
- Campaign
- Case
- Compensation Plan
- Compensation Plan Component
- Compensation Plans Flex
- Competitor
- Condition Attachment
- Condition of Approval Comment
- Condition of Approval Transaction
- Condition Comply Period
- Contact
- Contract
- Contests
- Deal Registration
- Duplicate Resolution Request
- Geographies*
- Goals
- Household
- HRHelpDeskRequest
- Hub Source System Reference
- Inbound Message
- Incentive Compensation Performance Measure
- Incentive Participant
- Incentive Participant Goal
- Incentive Participant Role Assignments
- Interaction
- Interaction Data
- Interaction Participant
- KPI
- Linked Party
- MDF Budget
- MDF Claim
- MDF Request
- Nonduplicate
- Note
- Objective
- Opportunity

- Organization
- Partner
- Partner Programs
- Performance Measure Flex
- Performance Measure Rate Dimensional Input
- Performance Measure Score Card
- Plan Component
- Plan Component Flex
- Plan Component Performance Measure
- Plan Component Rate Dimensional Input
- Plan Component Rate Table
- Price Book Header
- Product
- Product Group
- Program Enrollments
- Promotion
- Queue
- Relationship
- Resolution Link
- Resolution Request
- Resource
- Resource Capacity
- Sales Forecast Quota
- Sales Lead
- Sales Orders
- Sales Territory
- Sales Territory Quota
- Self-Service Role
- Service Profile
- Service Profile Contact
- Service Request
- Standard Lookups
- Standard Text
- Standard Text Folder
- Standard Text User Variable
- Subscription
- Template
- Territory Geographies. For more information see Export Territory Geography Zone Hierarchies? (Doc ID 2853475.1) on My Oracle Support.

- Transaction
- Trees
- Wrap Up

Note: *Legal Note:* By exporting the Geographies data from the Oracle environment to Your environment, You agree that (a) Oracle is granting You only a restricted right to download the exported Geographies data specifically for Your use with the Oracle Fusion services; (b) the Geographies data may not be used, transferred, or uploaded for any other purposes; and (c) except for the restricted right granted in (a), all provisions of the Oracle Cloud Services Agreement (CSA) or Schedule C, as applicable to You, remain in full force and effect, including specifically section 3.4 thereof.

Export Object Details

Click **Tools > Export Management > Export Objects**. To see the details of an export object, select it on the **Export Object Details** page. Here are the details that you see about each exportable object:

Column	Description
Display Name	The object as it's called in the user interface.
Language Independent Code	The internal name of the object.
Parent Object	The parent object of the selected object. If there are multiple parents for an object, they're shown separated by commas.
View Hierarchy	Clicking on the View Hierarchy icon shows the hierarchy between the parent and child objects in a graphical format.
User Key	The attribute or the group of attributes that's used to uniquely identify a record.
Required Attributes	The attribute or the group of attributes for which values are required to create a record. These can't be NULL when updating a record.

Target Attributes

Here are the details that you see for each target attribute.

Column	Description
Display Name	Name of the target attribute in the user interface.
Attribute Name	Internal or field name of the attribute.
Required	Indicates whether the attribute is mandatory or not.
Default Value	The default value for the attribute, if any.

Column	Description
Type	Data type of the target attribute.
Length	Maximum allowed length for the target attribute values.
Description	A short description of the target attribute.

Export Inactive and Merged Data

You can export inactive and merged accounts, contacts, households, organizations, and persons using export management. You don't need to rely on data model queries to fetch the deleted or merged records.

Note: To export inactive records, you need to explicitly add the condition to the criteria, or else only the active records will be exported. For example, I for Inactive and M for merged. All associated child records (active or inactive) will be exported irrespective of their status, if no criteria is added.

How do I get sales quotes to work in CX Sales Mobile?

You must complete two setups listed in this topic. After you complete them, sales representatives can quickly access Oracle Configure, Price, and Quote (Oracle CPQ) quotes related to their accounts and opportunities from Oracle CX Sales Mobile. Additionally, they can share the proposal document with the team for feedback, or email proposals to customers from the mobile app to speed up the negotiation cycle.

Here are the two steps you must complete to provide access to quotes in CX Sales Mobile:

1. Create a confidential application for CX Sales Mobile in Oracle Identity Cloud Service.

Note: If you already completed this step, you can just edit the application you created previously and add the new information. You don't have to create a new application.

2. Display the quotes and lists of quotes in the CX Sales Mobile UI.

Prerequisites: Before you start, you must complete all the steps to integrate Oracle Sales and Oracle CPQ. For details, refer to the Integrating Oracle CX Sales with Oracle CPQ guide and the Quotes and Orders chapter in Implementation Reference guide.

Create a Confidential Application for Oracle CX Sales Mobile in Oracle Identity Cloud Service

Here's how you create CX Sales Mobile as a Confidential Application in Identity Cloud Service:

1. Sign in to My Console in Identity Cloud Service, by navigating to **www.oracle.com > View Accounts** and enter the name of the relevant pod in the Cloud Account Name field. You have at least two pods, a test and a production pod, so ensure that you enter the correct pod.

2. Click **Next** and enter your Identity Cloud Service password. If you can't remember the password, contact Oracle Support for help.

Note: For more information about Identity Cloud Service, navigate to <https://docs.oracle.com>, search for Identity Cloud Service, and click Oracle Identity Cloud Service - Get Started.
3. In the Identity Cloud Service console, expand the **Navigation Drawer**, and then click **Applications**.
4. Click **Add**. Then on the **Add Application** page, click **Confidential Application**.
5. In the **Details** tab of the **Add Confidential Application** wizard, enter information in the **Name** and **Description** fields. These fields are used to identify the Confidential Application in Identity Cloud Service only, they don't appear outside of Identity Cloud Service. For example, they don't appear in the Oracle CX Sales app.
6. Click **Next**.
7. In the **Client** tab, click the **Configure this application as a client now** option.
8. In the **Allowed Grant Types** options list, select these options:
 - **Refresh Token**
 - **Authorization Code**
9. Select the **Allow non-HTTPS URLs** option.

Note: This option doesn't open a URL that isn't secure, it just sends a request to the CX Sales Mobile app.
10. In the **Redirect URL** field, enter `cxm: //?oAuth=true`
11. Click **Next**.
12. In the **Resources** tab, enter a value in the **Access Token Expiration** field. This defines how long the access token associated with CX Sales Mobile remains valid.
13. Select the **Is Refresh Token Allowed** option and enter a value in the **Refresh Token Expiration** field. This defines how long the access token can be refreshed until the sales representative needs to sign into the CX Sales Mobile app again.

When an access token expires, the CX Sales Mobile app uses a valid refresh token to get a new pair of access and refresh tokens. If the refresh token isn't valid, or has expired, the sales representative has to sign in again. If the refresh token is valid the CX Sales Mobile app uses it to get a new access token, which is used to validate subsequent access to the app.

Note: It's recommended to keep the access token validity to a short duration and the refresh token to a long duration. For example, 30 minutes for the access token and 7 days or more for the refresh token.
14. In the **Primary Audience** field, add your host URL.
15. In the **Secondary Audience** field, fill in your CPQ domain (for example, `https://xxxx-xxx.bigmachines.com`).
16. In the **Scopes** section, click **Add**, and enter the value `/cxmobile`.
17. In the **Scopes** section, click **Add**, and your CPQ scope. The CPQ scope will be in the form `<CPQ_domain>/api` (for example, `https://xxxx-xxx.bigmachines.com/api`)
18. Under Resources, select **Add Scope**.
19. Select the **Resource Client Oracle Applications (Fusion)**, which is the available resource provided by Oracle.
20. Add all required scopes from the resource client, including the CX Sales Mobile and CPQ scopes you just created.
21. Click **Next** to navigate to the **Web Tier Policy** tab. Nothing needs to be entered here.
22. Click **Next** to navigate to the **Authorization** tab. Nothing needs to be entered here.
23. Click **Finish**. The CX Sales Mobile application has been added in a deactivated state.
24. Record the **Client ID** and **Client Secret** that appear in the **Application Added** dialog box. The **Client ID** and **Client Secret** are equivalent to a credential (for example, an ID and password) that your application uses to communicate with Identity Cloud Service.
25. Click **Close**.
26. At the top of the page, to the right of the application name, click **Activate**.

- 27.** In the **Activate Application?** dialog box, click **Activate Application**.

For more information about creating a Confidential Application, navigate to <https://docs.oracle.com>, search for **Identity Cloud Service**, click **Oracle Identity Cloud Service - Get Started**, and click **Manage confidential Applications** under the Manage Applications heading.

Display Quotes and Quote Lists in the Mobile App

1. Enable Quote lists in the Navigator to display the Quote and Orders saved searches setup in Workspace:

Note: These steps are optional. You only need to enable Quotes lists in the Navigator if you want your users to have access to all of their quotes in aggregate.

- a. Enter a sandbox with Application Composer and click to **Application Composer > Mobile Application Setup**.
 - b. Click the **CX Sales Mobile Composer** tab.
 - c. In the Application Features pane, click **Home**.
 - d. Scroll down in the mobile interface designer pane and select the **Quotes and Orders** feature.
 - e. In the Feature Details, toggle **Show On Navigator** to On.
2. Quotes and Orders are enabled by default in the summary views of Accounts and Opportunities. If associated quote records exist for the parent records, then quote pickers appear in the Account and Opportunity Summary pages automatically. However, if you created page layouts before Update 21C and you want quotes to appear in these pages, then you need to enable quotes by following these steps:
 - a. In Summary view of the Accounts feature, select your custom page layout.
 - b. In the mobile interface designer pane, select **Add Child or Related**.
 - c. From the list of options, select **SalesOrders**.
 - d. Repeat these steps for your Opportunity Summary page layouts.
 3. Click **Save**.
 4. Test and publish your configurations.

How can I use Sales as my SSO provider with CPQ?

When integrating with Oracle Configure, Price, and Quote (Oracle CPQ), you can set up Sales as a Service Provider (SP) or as an Identity Provider (IdP).

To set up Sales as the IdP, you need to use Oracle Identity and Access Management (IAM)'s Identity Domains (formerly IDCS) as follows: Sales (IdP) < IAM Identity Domains (SP, IdP) < CPQ (SP).

By default, every Sales environment is configured as an IdP to IAM Identity Domains instance as an SP.

When integrating with Oracle CPQ, IAM Identity Domains can be the IdP for Oracle CPQ as SP. You need to configure the implementation as described in the Oracle CPQ section of the Oracle Identity Cloud Service - Application Catalog: *IDCS SSO Setup for CPQ*. Also see the *Single Sign-On (SSO) section* of the Oracle CPQ online help.

Additionally, see How To Configure SSO For CX Sales To CPQ Integration (Doc ID 2680045.1) on *My Oracle Support*.

How do I copy custom fields from one object to another?

Here's how you can copy custom fields from one object to another. In this example, we'll create a custom field in the Account object and copy it to the Subscription object.

Note: Access to a sandbox and Application Composer are required in this procedure.

1. Begin by creating a custom field for the Account object: Navigate to **Application Composer > Account > Fields**.
2. For this scenario, we're using a fixed choice list, so create a fixed choice list and set its list of values. Take note of the API Name since we'll use this later in this procedure.
3. Next, navigate to **Pages > Application Pages**.
4. Select the Edit Organization Details Region in the Details Page section.
5. Using the Available Fields list, highlight your recently created field and move it to the Selected Fields list.
6. Save and close and page.
7. Let's move on to the Subscription object: Look for it under the Standard Objects list and expand it.
8. Select **Fields** and create a new, custom field. We're using a simple text object, so make sure that it can hold the length of the values for the fixed choice list.
9. Navigate to **Pages** and select the **Details Page Layout**. Duplicate the standard layout and edit the copy.
10. Click the pencil icon near Edit Subtab: Summary.
11. Using the Available Fields list, highlight your recently created field and move it to the Selected Fields list.
12. Now let's create a trigger: Begin by selecting **Server Scripts Triggers**.
13. In the **Triggers** field, create a new trigger and set these values:
 - Trigger Name: Name the trigger something easy to remember, like PartyChange.
 - Field Name: Name the field PrimaryPartyId.
 - In the Trigger Definition use this sample code:


```
def org = newView('OrganizationProfile');
def view_Criteria = newViewCriteria(org);
def view_criteria_row = view_Criteria.createRow();
def view_condition = view_criteria_row.ensureCriteriaItem('PartyId');
view_condition.setOperator('=');
view_condition.setValue(PrimaryPartyId);
view_Criteria.insertRow(view_criteria_row);
org.appendViewCriteria(view_Criteria);
org.setMaxFetchSize(1);
org.executeQuery();

if(org.hasNext())
{
    def o = org.next();
    setAttribute('*REPLACE WITH ATTRIBUTE NAME OF CUSTOM SUBSCRIPTION FIELD *',o.*API Name for the
    Custom field in Account*)
    //For example
    //setAttribute('MyCustomSubText_c',o.CustomFCLTest_c)
```
14. Save your changes and test the change: Go to Setup and Maintenance and search for the Manage Customers task.
15. Search for and select an organization and verify that the custom fixed choice list you created is available in the organization information page.

16. Select a value, save your changes, and close the page.
17. Go to Subscription Management and create a new subscription.

Be sure to select the customer from the previous organization that you queried in the Manage Customers task.

18. In the Overview page, you should see the custom field for Subscription Management with the previously selected value.

Can I rename a custom role in an access group?

No, you can't. Make note of the name you give any custom roles in access groups so you can refer to them later if needed.

Related Topics

- [How do I create and manage access groups?](#)
- [How do I create membership rules for custom access groups?](#)
- [How do I enable team-based access to custom objects when using access groups?](#)
- [How do I configure real-time and near real-time access for access group object records?](#)

How do I set up VAT or other tax policies for CX?

You set up value-added taxes (VAT) and other taxes in the Oracle ERP applications, such as Oracle Financials.

The application you use depends on your configuration. On [Oracle Help Center](#), search using keywords for what you need, such as "VAT" or "tax".

What's the purpose of the Manage Message Templates functionality introduced in release 23B?

Using the Message Templates selection in Application Composer, you can create and manage email templates. Both salespeople and automated processes in Orchestration can use the templates to send outgoing emails. You create the templates for a specific object and can include attributes from that object as mail-merge fields. Salespeople who are using the template to send emails to customers can modify the text, and add their signatures and attachments.

Note: Use Message Templates. The Email Templates selection in Application Composer is a different feature entirely.

What's a foldout subview and what new search functionality was introduced in 23B?

Foldout subviews are the pages you can open from the record overviews in the new Sales in the Redwood user experience, by clicking a link at the bottom of the record overview panels. Whereas each panel on the record overview shows only the most important information, the subviews list them all. For example, the Contacts panel on an account record may display only three contacts, but clicking the View All Contacts link displays a subview (All Contacts page) that lists all the contacts. The new feature makes it possible to search for records in these lists using filters.

You can filter and search through the information on the Contacts, Accounts, Opportunities, and other the "All" pages in a record provided that the pages include the Action Bar. Which attributes you can filter and search on depends on the information type. If you added custom objects, you can filter on all of its attributes.

1. In the Action Bar, enter **filter** and select a filter. For example, on the All Contacts Page, you can filter on Name, Primary Email, Comments, and Contact Job Title.

Note: You can't filter on all of the common attributes, just on those listed. For example, you can't filter opportunities by sales stage. And you can't filter team resources by their role.

2. Select the operator.
3. Enter a search term in the **Value** field. You can enter only one keyword. Searches aren't case-sensitive and no operators are permitted.
4. Click **Apply**.
5. You can add additional filters.

Here's a screenshot of the Contacts page for an account with the Name filter applied, and Contains operator selected. Nelson is the search term entered in the Value field.

My Accounts

Pinnacle Technologies: Contacts

Industry	Address	Phone	Owner
Retail	600 4th Ave Rm 107, SEATTLE, WA 98104-1850	+1 (465) 476-8	Gabrielle Lee

Name

☒ Contains
☐ Equals
☐ Starts With
☐ Ends With

Value
Nelson

Cancel Apply

Name	Primary Email	Primary Contact
Joseph EVANS	sendmail-test-discard@oracle.com	No
Blake PHILLIPS	sendmail-test-discard@oracle.com	No

What's Next Gen Sales?

Next Gen Sales and Digital Sales are other names sometimes used for Sales in the Redwood user experience, a new conversational interface that's been built for Oracle Sales. The Redwood user experience includes many new features that aren't available in the previous version of the product. For example, the Redwood UX makes it possible for salespeople to interact with the application using natural language and chat bots. Sales administrators can boost sales performance by setting up motivational goals and contests and by walking salespeople through best sales practices for different sales situations using the Orchestration feature.

The new Redwood user experience gives virtual sellers the ability to search, find, and navigate their accounts with simple commands. Unlike other CRMs that rely on hidden tabs and buttons within a record, sellers simply tell the assistant what they need to do and the new virtual sales capability recommends the next best action—helping them convert leads, engage prospects, and update records with a few simple, intuitive keystrokes.

Can I delete a custom subtab that was added to the classic UI?

In the classic UI, you can't delete a custom tab after your sandbox is published, but you can hide it.

Here's how:

1. Create and enter a sandbox with Application Composer as one of the tools.
2. In Application Composer, select the object.
3. Expand the object in the object tree, and select the Pages node.
4. Select the Application Pages tab.
5. Find the type of page that you want to modify, such as the details page layout. You can create a new custom layout by clicking the **Duplicate Layout** icon to duplicate and edit an existing layout.
6. In the layout Subtabs region, click the **Hide, Show, and Reorder** button (the icon with the two vertical up and down arrows)
7. Hide the subtab.
8. Click **Done**.
9. Publish the sandbox.

Can I increase BI Publisher output to CSV beyond the maximum setting of 2 million records?

The default maximum number of rows for CSV output from BI Publisher is 1,000,000, although if required, you can download up to 2,000,000 rows to a spreadsheet. Downloading more than 2,000,000 rows, however, can lead to degradation of services and potential issues with BI Publisher reporting capabilities. BI Publisher is meant for creating documents. If you require to extract larger numbers of records, consider using Oracle Business Intelligence Cloud Connector (BICC).

For more information on configuring your BI Publisher settings, see the topic *How do I optimize BI Publisher settings to reduce issues with runtime memory and data export?*

Related Topics

- [Overview of Business Intelligence Cloud Connector](#)

How do I optimize BI Publisher settings to reduce issues with runtime memory and data export?

You can optimize BI Publisher settings in the administrative console of BI Publisher. Oracle recommends updating the configuration settings if you're facing runtime memory errors or issues with exporting reporting data. Setting your configuration above our recommendations can lead to degradation of services and potential issues with BI Publisher reporting capabilities.

To make updates, sign in to the XMLPServer as a user with administrator permissions and navigate to:

- **Administration > Runtime Configuration > Properties > Memory Guard & Data Model**

You can update the following configurations settings:

- Maximum Report Data Size for Online Reports
 - Default Configuration is 300MB
 - Configuration can be updated up to 1GB
- Free Memory Threshold
 - Default Configuration is 500MB
 - Configuration can be updated up to 2GB
- Maximum Rows for CSV Output
 - Default Configuration is 1,000,000 rows
 - Configuration can be updated up to 2,000,000 rows
- Maximum Data Size Limit For Data Generation
 - Default Configuration is 500MB
 - Configuration can be updated up to 2GB
- SQL Query Timeout
 - Default Configuration is 600 (seconds)
 - Configuration can be updated up to 1800 (seconds)

In SQL, how do I show a date in the date format: 19 July 2023?

Here's a SQL select statement and output to show a date in a format 19 July 2023.

SQL select statement : `SELECT TO_CHAR(SYSDATE, 'DD MONTH YYYY') FROM DUAL`

Output: `TO_CHAR(SYSDATE, 'DDMONTHYYYY')`.

Can we change the file type and delimiter for BI Cloud Connector (BICC) extracts?

No. You can't change either the file type or delimiter. You can extract data only in the CSV format.

To support parsing of the comma-separated value files, column values are wrapped in double quotes. The double quote value in the column is escaped using two consecutive double quote values. Because of this, a custom delimiter isn't required.

Related Topics

- [Manage Files in External Storage for Custom Warehouse Integration](#)

Why are users with my custom role for OTBI not able to see sales data in OTBI reports?

Sales data access depends on the resource and sales territory hierarchies the salesperson is in, regardless of the role. If a salesperson or manager isn't on a sales team or territory hierarchy and they don't manage people who are, they won't be able to see any opportunity or lead information.

How do I make custom PVOs visible in BICC?

In order to make a custom public view object (PVO) visible in BICC, you must first include the PVO in one of the offerings. You can then extract the data for that custom PVO through BICC.

To add a custom PVO to an offering:

1. Sign in on your BICC: **`https://<HOST>/biacm`**.
2. From the menu on the right, select **Manage Offerings and Data Store**.
3. Drill down on any offering to open the data store **Offering: <offering name>** page.

4. Click **Add** (the plus sign icon).
5. In Data Store Key, click the button **Search Extensions**.
6. Search for your custom VO. For example, if the custom object is Claims_c, then the PVO to be called is CrmAnalyticsAM.ExtensibilityAM.Claims_c.
7. Select the PVO.
8. Select the offering you want to associate the VO with.
9. Click **Done**.

How do I hide an OTBI file path in the browser address bar to enhance security?

You can mask the OTBI file path location shown on browser address bar by creating a dynamic URL for your reports.

For details, see [See the Oracle Support Document 2453010.1 \(How to create a dynamic URL for BIP reports, which will be generated dynamically based on input from an external application?\)](#)

How can I migrate an analysis or dashboard from one Fusion application environment to another?

You can copy analyses and dashboards from one environment to another using the Archive and Unarchive commands in BI Answers.

For details see [Oracle Support Document 1943582.1 \(Fusion Applications OBIEE :How Do We Migrate an Analysis or Dashboard from One Fusion Applications Environment to Another?\)](#)

Can I see prior changes to a field after I've added it to the application?

No, you can't. Audit history (also called change history) for a field only shows up in audit results after it's been added to the application.

See [What fields can I audit for Sales?](#) for details on the supported objects and how to enable change history in the application.

Is any data stored on the local machine when installing the Outlook add-in?

No data is stored on the local machine when users install the Microsoft Outlook add-in.

Can I create a custom subject area from a custom data model in BI publisher?

You can only create a custom subject area from the objects that are available in Application Composer. Joins that you've build on your custom SQL may or may not be available during custom subject area creation, depending on how the objects you're using are related. So, it will really depend on what custom SQL you're using on your data model.

In addition, data models aren't likely to use data security so they don't have any restrictions. By contrast, custom subject areas apply data security according to the roles and access granted from the application.

How do I create an analysis report for Lead Source?

Try "Lead" and "Channel Type Name" from the Marketing - CRM Leads subject area.

How do I make custom dynamic choice fields (DCLs) visible in analytics?

You add custom dynamic choice list fields (DCLs) to custom subject areas. Here's how.

1. Navigate to Application Composer.
2. Click **Custom Subject Areas** on the Overview page of Application Composer.
3. Select **Create** from the **Actions** menu.
4. In Define Custom Subject Area, provide the name for your subject area and select the primary object. Display labels have the Custom: prefix added automatically.
5. In Select Child Objects, add the child object.
6. In Configure Fields, add the DCL as follows:
 - a. Click **Select Fields**.
 - b. In the Select Fields window, select the **Related Object** option and select the object with the DCL.
 - c. Move the DCL field from the **Available Fields** list to the **Selected Fields** column.
7. Optionally, in **Configure Dates**, select one or more date columns for date leveling.
Date leveling lets you add calendar attributes to your analytics, which provide better context to your transaction data.
You can also select one date field to be the canonical date for the custom subject area. Do this if you want to create analytics that can drill up and down the date hierarchy.
8. In Configure Security, select the required security level for the **Everyone** Role Name, which is added by default. You can add additional role names by clicking in the + icon and define the security level for each one of them. The security definition here only controls who can access the custom subject area definition to create reports. It doesn't control data visibility which is automatically controlled based on the user running the reports.

9. In Review and Submit, review the custom subject area configuration for all added objects, attributes, and measures and click **Submit**.

After you submit, the custom subject area is published and made available within Oracle BI Composer. After you save or submit a custom subject area, you can't modify its primary object.

Which subject area can I use to create an analysis that shows the resource roles assigned to the resources within the internal resource organization hierarchy?

Use the Sales - CRM Resource subject area. The resource role is an attribute in the Employee/Resource folder and it is called "Employee Job Title Name". The resource role is also shown in Resource Hierarchy as <level> Position Name.

How do I create a report on fields on an object, such as a contact, that are filled or not?

Use the sample SQL query as a starting point.

1. Click **Create New Analysis** and select last option: **Create Analysis from Simple Logical SQL**.
2. Paste the sample query below:

```
SELECT

0 s_0,

(filter(sum("Sales - CRM Contacts"."Contact Fact"."# of Contacts") using "Sales - CRM
Contacts"."Contact"."Email Address" is not null)/sum("Sales - CRM Contacts"."Contact Fact"."# of
Contacts"))*100 s_1,

(filter(sum("Sales - CRM Contacts"."Contact Fact"."# of Contacts") using "Sales - CRM
Contacts"."Contact"."Email Address" is null)/sum("Sales - CRM Contacts"."Contact Fact"."# of
Contacts"))*100 s_2,

filter(sum("Sales - CRM Contacts"."Contact Fact"."# of Contacts") using "Sales - CRM
Contacts"."Contact"."Email Address" is not null) s_3,

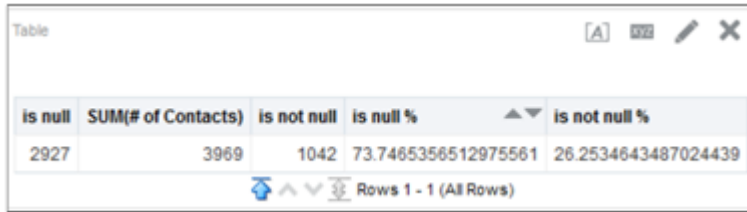
filter(sum("Sales - CRM Contacts"."Contact Fact"."# of Contacts") using "Sales - CRM
Contacts"."Contact"."Email Address" is null) s_4,

sum("Sales - CRM Contacts"."Contact Fact"."# of Contacts") s_5

FROM "Sales - CRM Contacts"
```

- 3.

Here's a sample output:



The screenshot shows a table with the following data:

is null	SUM(# of Contacts)	is not null	is null %	is not null %
2927	3969	1042	73.7465356512975561	26.2534643487024439

Below the table, there are navigation icons and the text "Rows 1 - 1 (All Rows)".

How do I manage geography validation?

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

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

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

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

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

Attribute Mapping

For every address style format, you can map each geography type to an address attribute. For example, you can map the **State** geography type to the **State** address attribute for the United States, or map the **State** geography type to the **County** address attribute for the United Kingdom. The geography types that appear are based on how the country structure is defined. The list of address attributes that appear are based on address formats delivered with the application, or your customer defined address formats.

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

Enable List of Values

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

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

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

Tax Validation

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

Address Validation

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

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

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

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

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

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

Country Name	Country Code	Geography Type	Map to Attribute
Andorra	AD	- Country - Parroquia - Settlement - Postal Code	- Country - State - City - Postal code
Angola	AO	- Country - Provincia - Município - Comuna	- Country - Province - County - City

Country Name	Country Code	Geography Type	Map to Attribute
		Localidad	Additional address attribute 2
Argentina	AR	- Country - Province - Department - Municipality - Postal Code	- Country - Province - County - City - Postal code
Australia	AU	- Country - State - City - Postal Code	- Country - State - City - Postal code
Austria	AT	- Country - Bundensland - Bezirk - Gemeinde - Postal Code	- Country - State - County - City - Postal code
Belgium	BE	- Country - Gewest - Provincie - Gemeente - Postal Code	- Country - Additional address attribute 1 - Province - City - Postal code
Bolivia	BO	- Country - Departemento - Provincia - Canton	- Country - Additional address attribute 1 - Province - City
Bosnia and Herzegovina	BA	- Country - District - Kanton - Opcine - Nasalje - Postal Code	- Country - Additional address attribute 1 - Province - County - City - Postal code
Brazil	BR	- Country - State - City	- Country - State - City

Country Name	Country Code	Geography Type	Map to Attribute
		Postal Code	Postal code
Bulgaria	BG	- Country - Oblast - Obshhina - Settlement - Postal Code	- Country - Additional address attribute 1 - Province - City - Postal code
Canada	CA	- Country - Province - City - Postal Code	- Country - Province - City - Postal code
Cayman Islands	KY	- Country - Island - District - Postal Code	- Country - State - City - Postal code
Chile	CL	- Country - Region - Provincia - Kommune - Postal Code	- Country - State - County - City - Postal code
China	CN	- Country - Province - City - Postal Code	- Country - Province - City - Postal code
Note: China geography structure is supported but geocoding isn't supported.			
Croatia	HR	- Country - Zupanije - Grad - Postal Code	- Country - Province - City - Postal code
Cuba	CU	- Country - Provincia - Municipio - City - Postal Code	- Country - Province - County - City - Postal code

Country Name	Country Code	Geography Type	Map to Attribute
Cyprus	CY	- Country - Periochi - Dimos - Postal Code	- Country - Province - City - Postal code
Czech Republic	CZ	- Country - Kraj - Okres - Obec - Postal Code	- Country - State - County - City - Postal code
Denmark	DK	- Country - Amt - Settlement - Postal Code	- Country - Province - City - Postal code
Dominican Republic	DO	- Country - Provincia - Municipio - Town - Postal Code	- Country - Province - County - City - Postal code
Ecuador	EC	- Country - Province - Canton - City - Postal Code	- Country - Province - County - City - Postal code
Estonia	EE	- Country - Maakond - Vald - Postal Code	- Country - State - City - Postal code
Finland	FI	- Country - Laani - Kunta - Postal Code	- Country - State - City - Postal code
France	FR	- Country - Region - Department - Commune	- Country - Additional address attribute 1 - State

Country Name	Country Code	Geography Type	Map to Attribute
		Postal Code	- City - Postal code
Germany	DE	- Country - Bundesland - Gemeinde - Postal Code	- Country - State - City - Postal code
Great Britain	GB	- Country - County - Township - Postal Code	- Country - State - City - Postal code
Greece	GR	- Country - Periferia - Nomi - Dimotika - Postal Code	- Country - State - County - City - Postal code
Guadalupe	GP	- Country - Commune - Postal Code	- Country - City - Postal code
Guam	GU	- Country - State - County - Municipality - Village - Postal Code	- Country - State - County - City - Additional address attribute 2 - Postal code
Guernsey	GG	- Country - City - Parishes - Villages - Postal Code	- Country - City - Additional address attribute 2 - Additional address attribute 3 - Postal Code
Hungary	HU	- Country - Megye - Jaras - Telepules	- Country - Additional address attribute 1 - Province - County

Country Name	Country Code	Geography Type	Map to Attribute
		• Settlement • Postal Code	• City • Postal code
Iceland	IS	• Country • Jaras • Telepules • Settlement • Postal Code	• Country • Province • County • City • Postal code
India	IN	• Country • State • City • Postal Code	• Country • State • City • Postal code
Indonesia	ID	• Country • Province • City • Postal Code	• Country • Province • City • Postal code
Ireland	IE	• Country • Province • Post County • Postal_Code	• Country • State • City • Postal Code
Isles of Man	IM	• Country • Locality • Settlement • Postal Code	• Country • City • Additional address attribute 2 • Postal code
Israel	IL	• Country • District • Subdistrict • City • Postal Code	• Country • State • County • City • Postal code
Italy	IT	• Country • Regione • Provincia • Comune • Postal code	• Country • Additional address attribute 1 • Province • City • Postal code

Country Name	Country Code	Geography Type	Map to Attribute
Jamaica	JM	- Country - Parish - Settlement	- Country - State - City
Japan	JP	- Country - Prefecture - City - Postal Code	- Country - State - City - Postal code
Jordan	JO	- Country - Muhafazat - Liwa - Tajma - Postal Code	- Country - State - County - City - Postal code
Kenya	KE	- Country - County - Division	- Country - State - City
Latvia	LV	- Country - Rajons - Pilseta - Postal Code	- Country - State - City - Postal code
Liechtenstein	LI	- Country - Wahlkreis - Gemeinde - District - Postal Code	- Country - Additional address attribute 1 - State - City - Postal code
Lithuania	LT	- Country - County - Municipality - Ward - Postal Code	- Country - State - County - City - Postal code
Luxembourg	LU	- Country - Canton - Commune - Settlement - Postal Code	- Country - State - County - City - Postal code

Country Name	Country Code	Geography Type	Map to Attribute
Malaysia	MY	- Country - State - District - Subdistrict - Postal Code	- Country - State - County - City - Postal code
Malta	MT	- Country - Region - Local_Council - Postal Code	- Country - State - City - Postal code
Martinique	MQ	- Country - Department - Arrondissement - Commune - Postal Code	- Country - State - County - City - Postal code
Mexico	MX	- Country - State - Municipality - Locality - Postal Code	- Country - State - County - Additional address attribute 2 - Postal code
Netherlands	NL	- Country - Province - Municipality - Town - Postal Code	- Country - Province - County - City - Postal code
New Zealand	NZ	- Country - Region - Town - Postal Code	- Country - State - City - Postal code
Norway	NO	- Country - Fylke - Kommune - Postal Code	- Country - Province - City - Postal code
Oman	OM	- Country - Muhafazah	- Country - State

Country Name	Country Code	Geography Type	Map to Attribute
		- District - City	- County - City
Peru	PE	- Country - Region - Provincia - Distrito - Postal Code	- Country - Province - County - City - Postal code
Poland	PL	- Country - Wojewodztwo - Powiat - Gmina - Postal Code	- Country - Province - County - City - Postal code
Portugal	PT	- Country - Distrito - Concelho - Settlement - Postal Code	- Country - Province - County - City - Postal code
Puerto Rico	PR	- Country - Commonwealth - Municipio - Barrio - Postal Code	- Country - State - County - City - Postal code
Qatar	QA	- Country - Municipality - Zone	- Country - State - City
Reunion Island	RE	- Country - Region - Department - Commune - Postal Code	- Country - State - County - City - Postal code
Romania	RO	- Country - Regiune - Judet - Settlement - Comuna	- Country - Additional address attribute 1 - Province - County - City

Country Name	Country Code	Geography Type	Map to Attribute
		Postal Code	Postal code
Russia	RU	- Country - Federal_District - Federal_Subject - Oblast - Postal Code	- Country - Additional address attribute 1 - State - City - Postal code
San Marino	SM	- Country - Comune - Postal Code	- Country - State - Postal code
Singapore	SG	- Country - Region - District - Postal Code	- Country - State - City - Postal code
Slovakia	SK	- Country - Kraj - Okres - Obec - Postal Code	- Country - Province - County - City - Postal code
Slovenia	SI	- Country - Regija - Upravna Enota - Obcina - Settlement - Postal Code	- Country - Additional address attribute 1 - Province - County - City - Postal code
South Africa	ZA	- Country - Province - District_Municipality - Local_Municipality - Postal Code	- Country - Province - County - City - Postal code
South Korea	KR	- Country - Jibang - Siti - Postal Code	- Country - State - City - Postal code

Country Name	Country Code	Geography Type	Map to Attribute
Spain	ES	- Country - Autonomous_Community - Province - City - Postal Code	- Country - Additional address attribute 1 - Province - City - Postal code
Sri Lanka	LK	- Country - Province - District - Divisional_Secretariat - Postal Code	- Country - Province - County - City - Postal code
Swaziland Note: This country maybe labeled Eswatini in Manage Territories.	SZ	- Country - District - Inkhundla - Town - Postal Code	- Country - Province - County - City - Postal code
Sweden	SE	- Country - Lan - Settlement - Postal Code	- Country - Province - City - Postal code
Switzerland	CH	- Country - Kanton - Bezirk - Gemeinde - Postal Code	- Country - State - County - City - Postal code
Taiwan	TW	- Country - County - Town - Postal Code	- Country - State - City - Postal code
Thailand	TH	- Country - Region - Changwat - Amphoe - Postal Code	- Country - Additional address attribute 1 - State - City - Postal code

Country Name	Country Code	Geography Type	Map to Attribute
Tunisia	TN	- Country - Governorate - Delegation - Postal Code	- Country - State - City - Postal Code
Turkey	TR	- Country - Sehir - Ilce - Kasaba - Postal Code	- Country - Province - County - City - Postal code
United Arab Emirates	AE	- Country - Emirate - City - Area	- Country - State - City - Additional address attribute 2
United States	US	- Country - State - County - City - Postal Code	- Country - State - County - City - Postal code
Uruguay	UY	- Country - Departamento - City - Postal Code	- Country - State - City - Postal code
Vatican City	VA	- Country - Municipal - Settlement - Postal Code	- Country - Province - City - Postal code
Vietnam	VN	- Country - Region - Tihn - Quan - Thank Pho - Postal Code	- Country - Additional address attribute 1 - Province - County - City - Postal code

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

Address Validation Control

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

These are the address validation levels you can choose:

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

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

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

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

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

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

Related Topics

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

Can I sync my Financials accounts with Sales?

After users create accounts and contacts in Oracle Financials, use the scheduled process, Synchronize Financials Cloud Accounts and Contacts, to sync the data into Oracle Sales. This retrieval process is one-way, from Financials to Sales.

Here's how the process works:

1. The scheduled process checks for all party records (organization and person) that have the Customer usage in Financials and that don't have a record in the Sales Accounts table (ZCA_SALES_ACCOUNTS) in the sales application.
2. For the identified records, the process inserts new records in the Sales Accounts table, and in the Party Usages table (HZ_PARTY_USG_ASSIGNMENTS), for Organization, Sales Account, and Person.

Important Points

Keep these points in mind as well:

- After the billing process finishes, the application creates billing accounts and contacts in Financials.
- The party used for the Sales account customer is available in Oracle ERP after you convert it to a billing account from the Oracle Accounts Receivable UI.
- The process supports addresses associated with customer accounts and contacts. It also supports address purposes, such as bill-to.
- Enable the Billing Accounts subtab from Application Composer to let your users see the customer account number and the description.
- If you need your data to refresh regularly, it's a good idea to set up a schedule for the process using the advanced option in the scheduled processes window.

Steps to Sync from Financials to Sales

To sync accounts and contacts data from Financials to your sales application:

1. Click **Navigator > Tools > Scheduled Processes**.
2. Click **Actions > Schedule New Process** and search for the **Synchronize Financials Accounts and Contacts with cx Sales** process.
3. Verify that the data is synchronized in your sales application: Sign in to the Accounts pages as a user who has access to the sales pages, such as the sales administrator or a salesperson, and view the new data.

Related Topics

- [How do I allow the update of sales contacts while protecting ERP contacts from being edited?](#)
- [Why are my accounts created in Sales appearing in Accounts Receivable?](#)

Why am I getting the error, "Unable to retrieve content. Additional information for Remote Region error #5?"

If you're getting the error, "Unable to retrieve content. Additional information for Remote Region error #5" when setting up products, it's possible that you haven't set the profile option, Sales Products Item Organization.

Set the profile option and try again.

How can users access both Sales and Service apps?

When you receive your Oracle Cloud application, access to its functionality and data is secured using a role-based access control security model. In a role-based access control security model, you provide users with roles which are assigned access privileges to protected resources. As long as users have the necessary roles, they can access both applications.

Oracle provides many predefined job and abstract roles as part of the security reference implementation for the sales and service applications.

Sales Roles

Here's some predefined job roles for sales users:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager
- Customer Contract Administrator
- Customer Data Steward
- Customer Relationship Management Application Administrator
- Data Steward Manager
- Enterprise Contract Administrator
- Enterprise Contract Manager
- Incentive Compensation Manager
- Incentive Compensation Plan Administrator
- Incentive Compensation Analyst
- Inside Sales Manager
- Inside Sales Representative
- Marketing Manager
- Marketing Operations Manager
- Marketing VP
- Master Data Management Application Administrator

- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Analyst
- Sales Catalog Administrator
- Sales Lead Qualifier
- Sales Manager
- Sales Representative
- Sales VP
- Supplier Contract Administrator

You also assign the following abstract roles to sales users who are employees so they can carry out their work:

- Employee
- Resource

If you're using the Incentive Compensation functionality, you can also assign the following abstract roles to users:

- Incentive Compensation Participant
- Incentive Compensation Participant Manager

Service Roles

Many job roles and duty roles are predefined in the Service offering. These are the predefined job roles specific to this product area:

- Chat Agent
- Customer Service Manager
- Customer Service Representative
- Knowledge Analyst
- Knowledge Manager
- Field Service Technician
- Internal Help Desk Administrator
- Internal Help Desk Agent
- Internal Help Desk Manager
- Case Manager
- Case Worker

Guidance for Assigning Predefined Roles

As a security administrator, you've access to the predefined roles and privileges that are readily available for assignment. However, you must assess the user's need before assigning those roles as is with the complete set of privileges.

Note: Be extremely cautious when assigning predefined roles as-is. "Advisory Note on Subscription Impact" in the *Security Reference for Common Features* guide.

When you assign predefined roles and privileges as is, you're entrusting users with full access to all data and functionality. Such unrestricted access without identifying the business need might pose a security concern. Also, the assigned privileges might account for subscription consumption irrespective of whether you bought the cloud service or not. A detailed list of all the predefined roles that impact subscription is available for reference. See the spreadsheet *Predefined Roles with Subscription Impact*.

If you're aware of a requirement or recommendation to assign specific predefined roles as is, it's fine to do so. For example, only while setting up an application, you might need to assign the predefined Application Implementation Consultant role as is. Once the setup is complete, you can unassign it. Otherwise, the recommended process is to always make a copy of the predefined role, remove the privileges you don't need, and assign only the required privileges. That way, you'll hit the subscription usage in a controlled way, based on your business need.

Note: Updates to Oracle Fusion Applications might also include changes to certain predefined roles. Check the release readiness documents for your product area to know if there are any updates to the predefined roles that are in use. If you find changes that are relevant, incorporate the same changes into your custom role. This will remain an ongoing maintenance activity for the custom roles.

For more information, see the "User and Role-Provisioning Setup Options" and other related topics in the *Securing Applications* guide.

See the *Security Reference for Sales and Fusion Service* guide for a complete list of roles and privileges in Sales and Fusion Service.

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

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

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

The following table summarizes the key decisions for this scenario.

Decisions to Consider	In This Example
Copy an existing country structure?	No, create a new country structure.
What is the structure of the geography types?	Create geography types with the following ranking structure: 1. County 2. Post Town
What is the geography hierarchy?	Create the following hierarchy:

Decisions to Consider	In This Example
	1. Country of United Kingdom 2. County of Berkshire 3. Post Town of Reading
Which address style format will you use when mapping geography validations?	The default address style format called the No Styles Format.
Are you using Oracle Fusion Tax for tax purposes?	No, don't select Tax Validation for the geography types.

Define the Geography Structure

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

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

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

Define the Geography Hierarchy

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

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

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

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

8. Click Save and Close.

Define the Geography Validations

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

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

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

Before you replace existing geography data, you must check its impact on all parts of the application. You can then import and set up reference geography data for the countries where you do business.

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

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

Before you begin, perform the following steps:

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

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

Create an Export File of All Territories

In case you have implemented Customer Data Management along with the sales functionality, you must export all territories before deleting the master geography data because removing the master geography data invalidates the

territory definitions that are based on the Geography dimension. You can either export the definitions of all territories to a file or make manual corrections. If there are a large number of territories, export the territories definition to a file for the territories import process. However, if there are very few affected territories, then you can choose to either export the territories definition to a file or make corrections manually.

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

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

1. From the Territories and Quotas work area, click **View Active Territories** in the Tasks pane.
2. In the View Active Territories page, select the territory at the highest level.
3. Click the **Actions** list, and select **Export**, and then **Export Selected Territory Hierarchy**.
4. In the Warning dialog box, click **OK**.
5. Click the **Actions** list and select **Export**, and then **View Export Status**.
6. Review the status of the export job and verify if it has completed successfully.
7. In the Exported Data File column, click the .zip file against your export job, and click **Save**. All the territories are exported to a compressed file on your system.
8. Click **OK**.
9. Click **Done** in the View Active Territories page.

Delete the Territory Geography Data

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

This procedure is applicable only if territory geographies are defined.

Perform the following steps to delete the territory geography data.

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

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

Delete the Master Geography Data

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

Delete Geography Structure

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

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

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

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

You can now proceed to importing geography data.

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

Import Oracle-Licensed Geography Reference Data

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

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

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

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

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

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

The import of larger countries may require several hours to complete. Note that countries may have different amount of data depending on the structure and the data can grow exponentially which correlates with different load times.

You can track the progress of the import process by selecting Scheduled Processes from the Navigator.

Note: To access the Scheduled Processes work area, you must be signed in as a user with the Employee abstract role. The initial user doesn't have this role assigned, but the other users you created do.

After the import is complete, you can search for the country again in the Manage Geographies page. Check marks now appear in the **Structure Defined** and **Hierarchy Defined** columns indicating the import completed successfully.

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

The **Geocoding Defined** and **Address Cleansing Defined** columns are used for additional features which you must license from Oracle and set up separately.

- Geocoding makes it possible to display customers in the vicinity of a mobile address. You set up **Geocoding Enabled** for those countries where you're using Around Me functionality in CX Sales Cloud Mobile.
- Cleansing makes it possible to validate addresses down to the street level.

Add any geography customizations.

Run the Geography Name Referencing Process

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

Run the GNR process in the following situations:

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

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

Perform the following steps to run the GNR process.

1. Navigate to **Tools > Scheduled Processes** work area.
2. On the Overview page, click **Actions > Schedule New Process**.
3. Click the **Name** list and search for **Validate Geographies of Addresses Against Master Geographies**, and then click **OK**.
4. Click **OK** in the Schedule New Process dialog box.
5. In the Process Details dialog box, enter the following details:
 - **Location Table Name:** HZ_LOCATIONS

- **Run Type:** ALL
- **Usage Code:** GEOGRAPHY
- 6. Enter the country code in the Country Code field.
- 7. Click **Submit**.
- 8. In the Confirmation dialog box, click **OK**.
- 9. Click **Close**.
- 10. In the Scheduled Processes page, click the **Refresh** icon.
- 11. Verify if the status of the process has completed successfully.

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

Recreate and Load the Territory Geography Data

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

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

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

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

Restore the Invalid Territory Definitions

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

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

To restore valid territory definitions using territories import:

1. Open the export file you saved in the Creating an Export File of All Territories step. The compressed file contains four CSV files.
2. Open **TERR_HEADER.CSV** file.
3. Enter **REPLACE** in the Action column for all territories that are based on geography dimension.
4. Save the file in CSV format and compress it together with three other CSV files.
5. From the Territories and Quotas work area, click **View Active Territories** in the Tasks pane.
6. Click the **Actions** list, and select **Import to Proposal**, and then **Import Territories**.
7. Select the newly created compressed file and click **OK**.
8. Click the **Actions** list and select **Import to Proposal**, and then **View Import Status**.
9. Review the status of the export job and verify if it has completed successfully.
10. Click **OK**.
11. From the Tasks pane, click **Manage Territory Proposals**.
12. In the Manage Territory Proposals page, on the Current Territory Proposals table, search for the proposal with your import file name.
13. Click the import file name to open the territory proposal.
14. Click **Edit Coverage** to verify that the territory definitions are valid.
15. Verify that there are no values listed as invalid in the Selected Dimension Members section.
16. Click **Save and Close**.
17. Click **Activate**. The territory proposal of your import file is activated.

To restore valid territory definitions through manual corrections:

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

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

To run the batch assignment process for opportunities:

1. From Navigator, click **Scheduled Processes**.
2. In the Schedule Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, search for the **Request Revenue Territory Assignment** process and select it.

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

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

To run the batch assignment process for sales accounts:

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

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

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

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

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

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

Can I translate dynamic choice list (DCL) values into the language of the signed-in user?

No, DCL values are actual transaction records from another object, so can't be translated. You can translate the displayed text on fixed-choice list (FCL) fields, but not transactional records.

Is there a way to add links to attachments in a report?

You can create an SQL syntax similar to this example for opportunity attachments. You must have the AttachmentsRead role. It gives you read access to attachments to UCM server.

```
SELECT

fdt.file_name,

fd.DATATYPE_CODE,

fdt.dm_document_id,

fdt.dm_version_number,

fdt.dm_version_number document_id,

fdt.dm_document_id UCM_file,

CASE

WHEN fd.DATATYPE_CODE = 'WEB_PAGE' THEN FDT.URL

ELSE

'https://'

|| h.EXTERNAL_VIRTUAL_HOST

|| '/cs/idcplg?IdcService=GET_FILE&dID='

|| fdt.dm_version_number

|| '&dDocName='

|| fdt.dm_document_id

|| '&allowInterrupt=1'

END File_Link

FROM

fnd_attached_documents fad,
```

```
fnd_documents_tl fdt,

FND_DOCUMENTS fd,

FUSION.ASK_DEPLOYED_DOMAINS h

WHERE

h.DEPLOYED_DOMAIN_NAME = 'FADomain'

AND fad.document_id = fdt.document_id

AND fad.document_id = fd.document_id

AND fdt.LANGUAGE = 'US'

AND fad.pk1_value = {{Optyid'}}
```

What determines which task and appointment notifications salespeople receive?

Task and appointment notifications both through the Notifications (Bell icon) and Things to Finish are controlled by profile options that you can set both at site and user levels. For example, to have salespeople notified when they're added to an appointment as a resource, you set the profile option Appointment Resource Notifications (ZMM_ACTIVITY_APPT_NOTIF_RESOURCE) to Yes. You can enable notifications for everyone by selecting Yes at the site level, or notify specific individuals you enter.

Here's how to obtain a list of the profile options and set them:

1. In the Setup and Maintenance work area, open the **Manage Administrator Profile Values** task:
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o Task: Manage Administrator Profile Values
2. In the Search section, **Profile Option Code** field, enter **ZMM_ACTIVITY%_NOTIF%** and click **Search**.

The application displays a list of profile options that you can set to control notifications for tasks and appointments.

You must run the Synchronize Notifications in Global Header scheduled process to ensure that all the in-app notification UIs reflect the latest task status. For details about this process, see the topic [Synchronize Notifications in the Global Header and Home Page with Workflow Tasks](#).

How do I enable desktop pages for Resource Directory?

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

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

You use the Resource Directory to perform the following tasks:

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

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

Note: You can set the profile option HZ_RESOURCE_ALLOW_CUSTOMIZATION to Yes to enable desktop pages for Resource Directory in Application Composer. The default value of this profile option is No.

How do I set up the required address option for accounts and contacts?

Administrators can set an address as required or optional depending on the type of account or contact. You can specify that an address is required and determine how the address appears on the UI.

Manage Profile Values

Use the Manage Administrator Profile Values task to specify that an address is required while creating an account. Profile options let you enable or disable address options for accounts and contacts. Use these profile options to specify that an address is required while creating an account.

Profile Option Code	Profile User Name	Description
ZCA_ACCOUNT_ADDRESS_REQUIRED_ENABLED	Account Address Required	Specify whether an address is required while creating an account.
ZCA_CONTACT_ADDRESS_REQUIRED_ENABLED	Contact Address Required	Specify whether an address is required while creating a contact.

This table lists the profile values and which types of accounts require the address to be entered. By default, the profile option setting is **Required for customer**.

Profile Value	Description	Required for Account Type
Yes	The address is required.	All types of accounts.
No	The address isn't required.	The address is optional, regardless of the account type.
Required for customer	The address is required only for the account type that's set to this profile value.	The address is required only for customers.

To make the address required while creating an account:

1. In the Setup and Maintenance area, go to the following:
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o Task: Manage Administrator Profile Values

2. Click the **Manage Administrator Profile Values** link.

The Manage Administrator Profile Values page appears.

3. Enter the code in the Code field, and click **Search**.

The application displays the profile option information.

4. In the Profile Values section, select **Yes** in the Profile Value field.
5. Click **Save and Close**.

Manage Address Formats

Use the Manage Address Format task to set up address attributes. The address format lets you manage the appearance of the address for accounts and contacts. For example, you can change the case of letters in an address, or mark a specific address attribute as required.

To specify which fields in an address are required:

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

2. Click the **Manage Address Formats** link.

The Manage Address Formats page appears.

3. Select a country from the drop-down list.
4. In the Format Variation Layout area, select the fields that you want to set as required in the **Required** column.
5. Click **Done**.

Groovy Support for Numbering Management

You can automatically generate the site ID of an address while creating a contact or an account using a groovy script. Before you can use the groovy script, you must verify that the value for HZ_GENERATE_PARTY_SITE_NUMBER profile option is set to Auto numbering, update allowed (AUTONUM_UPDATE).

How do we dynamically insert logo images into our RTF template?

To dynamically insert images such as logos into BI Publisher templates, follow the instructions on Oracle Support in article [How to use images dynamically in BI Publisher RTF template \(Doc ID 2409855.1\)](#). The article includes sample code and a link to a sample template.

What are the available data import options?

You can import your data from an external application into Oracle Applications Cloud in several different ways, including using public web services.

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 one cloud service with other cloud services, then you must use additional import methods as described in the appropriate guides.

When you're importing data for a particular object, you must make sure that any prerequisite objects 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 one import job depends on the contents of another import job, then complete the prerequisite job before starting the dependent job. For example, if you're importing both accounts and opportunities, then import accounts before importing opportunities.

The following table lists the import methods and references to further information.

Import Method	Description	When to Use	How to Access	For More Information
Quick Import Excel Macros	You can use the import macros to speed up and simplify the import of up to 5000 records at a time for some objects. They validate your data entries, provide list of values, and automatically populate constant values. The macros create data files that are automatically imported using Import Management.	These are best to import data in your initial deployment. The macros are targeted to the simple proof of concept sales automation use case covered in the Importing Sales Users chapter of the Getting Started with Your Sales Implementation guide. For example, the import macros assume that you're importing account, contact, and lead records for one country at a time.	You can download the Excel macros and any required mapping files from the Getting Started with Your Implementation: Quick Import Macros (Document ID 2229503.1) article on My Oracle Support.	The chapters in the Getting Started with Your Sales Implementation guide provide detailed instructions and video tutorials for using the macros. For instructions on how to add your own fields to the macros, see. How to Configure Quick Import Macro for importing Employee Resources (Doc ID 2364229.1) article on My Oracle Support.

Import Method	Description	When to Use	How to Access	For More Information
	You can import the following objects using import macros: • Sales Users • Products and product groups • Accounts • Contacts • Account Hierarchy • Leads • Opportunities	The macros generate log files with information about the File Import job, and these log files can also serve as a learning tool for more complex import.		
Import Management	Import Management improves definition, error handling, and performance for importing flat files (.CSV). For example, Import Management has drag and drop mapping capabilities and validates the first ten records in your data file before you import to ensure the data meets the import constraints of the various attributes. Import Management is available for importing data for the following application objects and their child objects: • Access Groups • Account • Action • Action Plan • Activity • Address • Asset • Attachment • Business Plan • Campaign • Case • Classification • Classification Code • Competitor • Consumer • Contact	Use Import Management for importing outside the scope of the Getting Started with Your Implementation guide.	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	For More Information
	- Contract - Contests - Country Structure - Deal Registration - Hierarchy - Hierarchy Member - Household - Hub Source System Reference - Incentive Rule Assignments - Incentive Rule Attribute Values - Incentive Rules - Incentive Transaction - Interaction - MDF Budget - MDF Claim - MDF Request - Note - Objective - Opportunity - Organization - Partner - Partner Program - Person - Price Book Header - Product - Product Group - Program Enrollment - Promotion - Queue - Relationship - Resource - Resource Capacity - Sales Lead - Sales Order - Sales Territory - Sales Territory Quota - Self-Service Role			

Import Method	Description	When to Use	How to Access	For More Information
	• Service Request • Standard Text • Standard Text Folder • Standard Text User Variable • Subscription • Template • Template Action • Territory Geographies • Any additional objects you create			
External Data Loader Client	Command-line tool that's used to import high-volume flat source data files into CX Sales and Fusion Service. This tool splits a large data file into multiple smaller files to adhere to import volume limits, and enables the tracking of import status. The client supports the same objects as Import Management.	Use this import method for importing very large data files for the 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. The chapter Import Data Using External Data Loader Client in the guide Understanding Import and Export Management for CX Sales and Fusion Service provides information about using the External Data Loader Client.
Web Services	Web services are available for external client applications to start and monitor import jobs. You can manage Import Management jobs using REST web services, and File Import jobs using SOAP web services.	Use web services to manage import jobs to import directly from an external application.	Public APIs are available for both the Import Management/REST services and the File Import/SOAP services. The following REST APIs are available for import: • Import Activities • Import Activity Maps • Import Export Objects Metadata The SOAP service is called the File Import Activity Service.	For REST API documentation, see the REST API for CX Sales and Fusion Service guide. For SOAP API documentation, see the SOAP Web Services for CX Sales and Fusion Service guide.
High-Volume Import	The high-volume import mode is designed to import millions of records at once. This mode doesn't trigger any custom logic configured through the application composer. This option is available for the following objects and their child objects:	Use this import mode for importing very large number of records for the objects supported.	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 this mode of import.	For REST API documentation, see the REST API for CX Sales and Fusion Service guide. The chapter Import Data Using External Data Loader Client in the guide Understanding Import and Export Management for CX

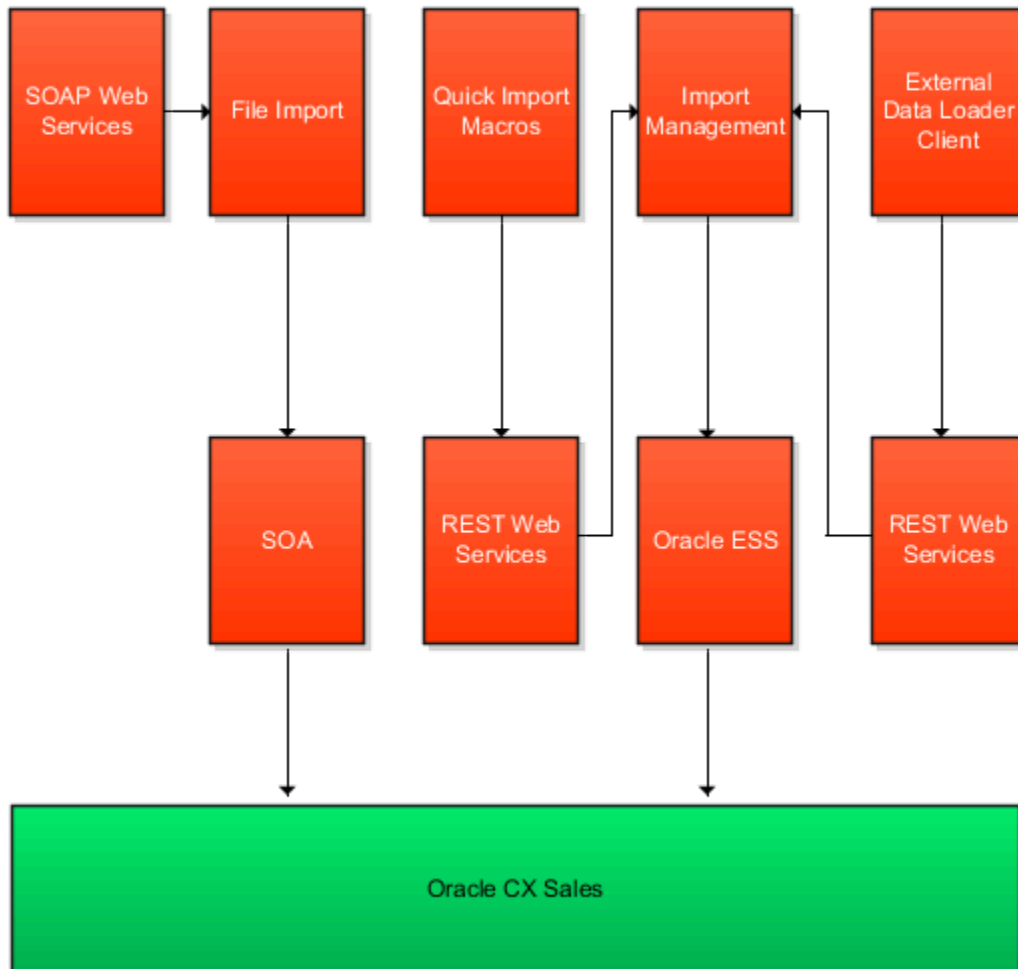
Import Method	Description	When to Use	How to Access	For More Information
	- Account - Address - Asset - Classification Code - Contact - Contract - Contract Line - Country Structure - Custom Object (custom top level objects and custom child objects) - Geography - Hierarchy - Hierarchy Member - Household - Hub Source System Reference - Incentive Transaction - Organization - Person - Sales Territory Quota - Territory Geographies		When importing using the External Data Loader Client, set the command-line parameter "-high-volume" to enable this mode of import.	Sales and Fusion Service provides information about using the External Data Loader Client.

Note: Object work flows can't be invoked using Import Management.

The following figure provides an architectural overview of the different import methods:

- File Import uses the SOA architecture to import data into Oracle CX Sales.
- Quick Import uses the REST Web services to import data into Oracle CX Sales. When you import data using the quick import Excel macros, you're creating an import activity in Import Management using the REST web services. The macro import creates the same import activity and uses the same mapping as you do when you initiate the import from the application. You can monitor each import in the macro or in the application itself.
- Both Import Management and the External Data Loader Client use the same scheduled processes for import. When you import very large files using the client, the REST APIs create multiple processes to respect the Import Management file size limit.
- To import from an external application, use the SOAP and REST web services directly.

Import Options and Flow



Related Topics

How do I generate the resource reporting hierarchy?

Use the Reporting Hierarchy Generation scheduled process to generate the resource reporting hierarchy for a given internal resource organization hierarchy, a sales, or a marketing organization hierarchy. This scheduled process also updates the reporting hierarchy when changes occur in the organization hierarchy.

You can run this scheduled process when new resources are created in Import Management using Resource User.

When to Use

This scheduled process:

- Updates the reporting hierarchy in accordance to the changes in internal resource or partner organization hierarchy. This scheduled process updates the reporting hierarchy in accordance with the changes in internal resource hierarchy. The resource's reporting manager isn't updated unless you run this scheduled process.
- Must be run after you make any changes to the hierarchy such as changing the manager or the organization.

Privileges Required

Verify that you have the following privilege or roles:

- Roles:
 - Application Implementation Consultant
 - Master Data Management Application Administrator
- Privilege:
 - Run Trading Community Resource Reporting Hierarchy Generation

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
 - You can run this scheduled process when new resources are created in Import Management using Resource User.
 - You can run this scheduled process when the same resource is visible multiple times in Team Members tab of Opportunity.
 - You can run this scheduled process as needed or at appropriate intervals, such as daily.
- Compatibility:
 - This scheduled process is self-incompatible. If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.

Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Tree Structure Code	Mandatory	Specifies the type of resource hierarchy.	RESOURCE_ORG_TREE_STRUCTURE PARTNER_ORG_TREE_STRUCTURE	None	This parameter is List of Values driven. Selecting RESOURCE_ORG_TREE_

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
					STRUCTURE builds the internal resource hierarchy. Selecting PARTNER_ORG_TREE_STRUCTURE builds the corresponding partner tree.
Tree Code	Mandatory	Specifies the tree code.	GLOBAL_SALES_MARKETING	None	This parameter is List of Values driven. Select 'GLOBAL_SALES_MARKETING' for internal resource hierarchy. Select corresponding tree code for Partner Hierarchy.
Tree Version ID	Mandatory	Specifies the version ID of the Tree.	Any	None	This parameter is List of Values driven. Select corresponding Tree Version ID for the hierarchy that must be re-generated.

How do I synchronize the GUID of users?

You can use the Synchronize User GUID scheduled process to synchronize the user GUID of users including Employees, Contingent Workers, and Partner Contacts in CRM database.

When to Use

This scheduled process is used to:

- Update the user GUID in CRM database for users.
- Remove the user GUID from CRM database for inactive parties.
- Remove invalid user GUID from CRM database that doesn't exist in HCM database.

Privileges Required

Verify that you have the following privileges or roles:

- Application Implementation Consultant

- Master Data Management Application Administrator

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency
 - You can run this scheduled process when some users aren't properly connected to Person Parties.
 - You can run this scheduled process on ad hoc basis or schedule it for appropriate frequency, such as daily once.
- Compatibility
 - No self-incompatibility defined.

Parameters

None.

How do I map import fields?

After entering the import options, map the fields in the source file to the corresponding target attributes.

You can do these in the section:

- Automatic Mapping
- Map Fields
- Save the Import Mapping

Automatic Mapping

The automatic mapping feature maps the source file columns to the target attribute columns. The application automatically saves the mapping created under the name **Automatic Mapping** and lists it in the **Import Mapping** drop-down list.

For an import file attribute to get automatically mapped, the column header for the attribute in the import file should be same as the Attribute Name. You can view the Attribute Name and Attribute Display Name in the **Import Objects** tab.

Note: You must map the column headers to the attribute display name when using an exported file to import. The exported file contains the display name as column headers, hence doesn't get automatically mapped.

You can download the import object templates from the Import Objects tab, and use them to create the source CSV file for your import. The templates have prepopulated column headers that ensure that the attributes are automatically mapped.

For auto mapping to work correctly provide the name of the columns in the input CSV file.

Follow the below steps to create the source CSV file for your import:

1. Navigate to **Tools > Import Management > Import Objects**

2. Filter the object based on display name of the object or language Independent Code (ObjectCode)
3. Download the file and decompress it.
4. In the file named like <ObjectCode>.csv, remove the 2nd row.
5. Use the names in the first row for column names of the input .csv file.

For more details, see the readme.txt.

You can override a column mapping by dragging target attributes from the **Target Attributes** section to the **Attribute Name** field of the **Source File** section. If you change the mapping, then you must save the mapping with a different name. Once you provide the name, the date and year time stamp is appended to the mapping name. The newly created mapping appears in the **Import Mapping** drop-down list. To apply the automatic mapping instead of your custom mapping, select Automatic Mapping from the **Import Mapping** drop-down list and click **Apply**.

Map the Fields

The Map Fields section can be subdivided into source file columns and target attribute columns. The source column header value is derived from the source file.

The following table outlines the source columns.

Source Column	Description
Column Header	Represents the column header for the text files.
Example Value	Values are derived from the first source file saved with the predefined mapping. If you didn't select a predefined mapping, then the example values are taken from the first data row in the source file selected in the first step of the Import Activity definition.
Attribute Name	Represents the target attribute that's to be mapped to the source column.

The following table outlines the target columns.

Target Column	Description
Target Attribute	The attribute name that represents the corresponding table column for the object.
Required	Indicates whether the target attribute is a required or a user key. Required indicates that the key is required while creating a new record. User key indicates that the key is required while updating an existing record.

Note: For required fields, ensure that data is available for the respective attributes in the input CSV file. You can use the validate function to check if all required fields are available before submitting the import job.

Save the Import Mapping

You can use automatic mapping to map the source file attributes to target attributes as described in the previous section. To map more attributes or override existing mappings, then click **Save As** and save your custom map. The name of a mapping file must be unique for the object.

For more information on how to import your data, see the object-specific import topics in the chapter Import Your Data. These topics are titled Import Your <Object-Name> Data. They provide the following information about importing data:

- How to map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
- Required attributes and validations for the object.
- How to create the source CSV file with the data you want to import.
- How to start an import activity.
- How to check the import results to know if the import went well.

Related Topics

- [How do I import data?](#)

How do I create a report that lists attachments?

While there's no subject area for you to use in creating a BI report on attachments, you can use Oracle BI Publisher to get the information.

Sign in to BIP and use the below query.

```
Select ENTITY_NAME,count(*)
FROM FUSION.FND_ATTACHED_DOCUMENTS
WHERE ENTITY_NAME not in
('ESS_REQUEST_HISTORY','ZCA_EXP_BATCHES','MKT_CM_CAMPAIGNS','MKT_IMP_JOBS','MKT_TM_TREATMENTS','MOO_STG_B')
Group by ENTITY_NAME
Other columns of interest in FND_ATTACHED_DOCUMENTS are
Object Type
ENTITY_NAME
Object Id
PK1_VALUE
AttachmentId
ATTACHED_DOCUMENT_ID
Document Id
DOCUMENT_ID
```

The other table which can tell file name with extension is

```
select a.ENTITY_NAME,a.PK1_VALUE,a.ATTACHED_DOCUMENT_ID,
      d.DOCUMENT_ID ,d.TITLE ,d.DM_DOCUMENT_ID ,d.FILE_NAME
FROM FUSION.FND_ATTACHED_DOCUMENTS a ,FUSION.FND_DOCUMENTS_TL d
Where a.DOCUMENT_ID = d.DOCUMENT_ID

and a.ENTITY_NAME not in
('ESS_REQUEST_HISTORY','ZCA_EXP_BATCHES','MKT_CM_CAMPAIGNS','MKT_IMP_JOBS','MKT_TM_TREATMENTS','MOO_STG_B')
```

How can I build a report that shows when a specific report has been run and when?

You can build a report using the OTBI Usage Real Time subject area.

Here's an example:

```
SELECT
"OTBI Usage Real Time"."OTBI Report"."Report Name" s_1,
"OTBI Usage Real Time"."OTBI Report"."Report Path" s_2,
"OTBI Usage Real Time"."Time"."Report Start Date" s_3,
"OTBI Usage Real Time"."Time"."Year" s_4,
"OTBI Usage Real Time"."User"."User Name" s_5,
"OTBI Usage Real Time"."Facts - Usage Metrics"."Report Execution Count" s_6
FROM "OTBI Usage Real Time"
WHERE
(("Time"."Year" = '2023') AND ("User"."User Name" LIKE 'USERNAME%'))
```

How do I obtain a list of duty and data roles for Fusion CX?

You can view all the duty and data roles in the [Oracle Security Reference for Sales and B2B Service](#) guide, or you can obtain spreadsheets you can filter on Oracle Support.

See the following Oracle Support articles for the spreadsheets and more information:

- [Oracle CX Sales and B2B Service: Security Reference Spreadsheets \(Doc ID 1677508.1\)](#)
- [Mapping of Roles, Duties and Privileges in Fusion Applications \(Doc ID 1460486.1\)](#)
- [Security Resource Center \(Oracle CX Sales and B2B Service\) \(Doc ID 1609084.1\)](#)

How do I refresh BI reports audit data for user adoption reporting?

Use the Refresh BI Reports Audit Data for User Adoption Reporting scheduled process to refresh the BI report audit tables for user adoption reporting.

This scheduled process interacts with the database to deliver and refresh data that you see in the BI reports for user adoption and usage tracking for the application.

When to Use

This scheduled process:

- This scheduled process is used for supporting Reporting on User Adoption.
- There are no jobs that must be run before this job is executed.
- This scheduled process is used for collection and aggregating data needed for reporting on user Adoption.
- BI reports based on user adoption don't reflect the correct data, if this job isn't run.
- The User Session Activity Tracked profile option (FND_TRACK_USER_ACTIVITY) must be enabled for this scheduled process.

Privileges Required

Verify that you have the following privileges or roles:

- Privileges
 - ACM_RUN_CRM_ANALYTICS_REFRESH_AUDIT_TABLE_JOB_PRIV
- Roles
 - Sales Administrator
 - Sales VP
 - Sales Manager

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
 - It is recommended that you run this process once a day at the end of business.
- Execution Time:
 - It takes around 2 to 5 minutes to complete processing one batch of records.
 - This scheduled process completes running few hundreds of records within a minute.
- Compatibility:
 - There are no compatibility issues with other scheduled processes and itself.

Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Full Refresh	Mandatory	Specify Yes (Y) if you want to purge all the data.	Y or N	None	It is recommended that you run this scheduled process with Full Load ="N" to incrementally capture the audit data. This scheduled process performs better when run as an incremental Load.
Purge After (Months)	Mandatory	Specify the number of the months after which the audit data is purged.	Specify a number.		This parameter determines the retention period of the audit data. For example, you specify "13" as the value of this parameter, audit data older than 13 months is purged. Audit data up to 13 months is maintained.

Troubleshooting Information

- If you configure this scheduled process to notify you in case of failures, you will receive reports of failures.
- This job can be restarted, if it doesn't run successfully.
- The job can be restarted in case of failures. No clean up activity is needed.
- The latest user adoption data is reflected in BI reports, if the job runs successfully.

How does Oracle back up my Sales data?

Oracle Cloud Operations makes daily backups of your production and test environments for use in case of a catastrophic failure. Oracle Cloud Operations doesn't perform backup or restore operations on demand, however. Once provisioned, you're the sole owner of the data and metadata configuration. Oracle Cloud Operations thoroughly tests all releases and fixes to eliminate a need for you to request such backup or restore operations.

You can make backups of your own by exporting sales data using Export Management. You can export metadata using Customization Set Migration (CSM) and Functional Setup Manager (FSM) Migration. You can migrate BI Publisher

reports and data models from one environment to another. For more details, review the following documents from Oracle Support:

- *Frequently Asked Questions on Hosting Scenarios for Oracle Cloud Fusion Applications Services (Doc ID 1537549.1)*
- *Best Practices and Recommendations for Using Customization Set Migration (CSM) Feature (Doc ID 2116725.1)*
- *Best Practices for Functional Setup Manager Migration - Export and Import (Doc ID 2632594.1)*
- *Business Intelligence Publisher Enterprise User Interface Steps To Migrate The BI Publisher Reports Folder And Data Models From One Environment To Another (Doc ID 2494901.1)*

Is there a way to push updates to CX Sales Mobile immediately, without having users sign out?

When you publish a sandbox with changes to your CX Sales Mobile application, users don't have to sign out of the app, but they must force-close the app and reopen it for the changes to be visible.

Is there any duplicate checking when creating territories?

You're prevented from creating duplicate territories in the UI. The application ignores duplicate territories when they're imported.

Application Usage Insights are enabled in BI and the Objects tab shows correct data, but there's no data in the Sessions tab. Why?

You must run the process Refresh BI Reports Audit Data for User Adoption Reporting to collect the audit data. Oracle recommends running the process once every day.

The Oracle Enterprise Scheduler process accepts 2 parameters:

- **Full Load (Y/ N):** Set to N to incrementally capture the audit data. This setting ensures better performance and prevents the deletion of all the historical audit data you collect.
A setting of Y deletes all your historical audit data regardless of the number of months you enter in the **Purge after (Months)** parameter.
- **Purge after (Months):** Enter the number of months you want to retain the audit data. Entering 12, for example, causes the purging of audit data you collected that's older than 12 months. You always retain the latest 12

months worth of data. If you're starting to capture data today, the audit will start purging a month's worth of data after at the end of the 13 month.

How do I default the current year in a date parameter in a BI Publisher data model?

You can use the same sysdate function `{ $SYSDATE () $ }` that's used to default a date in the parameter and specify the date format string as `yyyy`.

Here are the settings:

Attribute Name	Attribute Value
Name	p_year
Data Type	Date
Default Value	{ \$SYSDATE () \$ }
Parameter Type	Date
Display Label	Enter Year (YYYY Format)
Text Field Size	4
Options (Ignore User Timezone)	Checked
Date Format String	yyyy

Can I display sales territory change history in the UI?

No, but you can create a report of the changes instead. The Change History subtab doesn't display sales territory changes. However, you can enable audits of territory management using the setup task Manage Audit Policies in the Setup and Maintenance work area, and then view the report in the Audit Reports work area, which is available in the Navigator, Tools section.

To set up auditing, you must be a setup user, a sales administrator, or have another job role that includes the Manage Sales Audit Policies privilege (FND_MANAGE_SALES_AUDIT_POLICIES_PRIV).

Saved searches are displayed in alphabetic order. Can I reorder them?

No. Saved searches are always displayed in alphabetic order. The only way to change the order is to rename them.

How do I navigate the Hierarchy Viewer to view account hierarchies?

The panel shows default hierarchy rollups, such as:

- Total number of accounts in the hierarchy
- Revenue from won opportunities
- Potential Revenue from open opportunities
- Open opportunities

The Account Hierarchy panel shows the address details and the total child accounts of the parent company of the account.

Click **View Account Hierarchy** for more information, such as the subsidiaries of the account, their primary contacts, and addresses. You can toggle between the tree table view and the grid view. You can use the breadcrumbs to navigate through the hierarchy. Drill down the Open Opportunities and Won Opportunities columns on the Opportunity summary tab to view the amounts of individual child records and cumulative amounts of parent records including its child record amounts.

Why aren't Microsoft Outlook emails syncing to CX?

You might not have added permissions to the users in Microsoft Azure and in Oracle Sales.

With delegated permissions, when your users' Microsoft token expires (90 days from last sign-in in the add-in), the sync fails with error until the users re-sign into the add-in.

If you want sync to continue seamlessly without your users needing to sign-in to the add-in every 90 days, then you can add application permissions for the APIs required for the integration to the application registered in Microsoft Azure.

After you give the extra application permissions to the application in Microsoft Azure, the standard sync scheduled process uses the permissions to sign in. The add-in, meanwhile, continues to use the existing delegated permissions.

Note: Only administrators can enable the application permissions.

After you give the extra application permissions, your users need to sign in to the add-in just once and then they don't need to open the add-in again.

Add and Enable Application Permissions

To add and enable the application permissions for the add-in:

1. Add the application permissions in Microsoft Azure for the application you created for the Oracle Microsoft 365 add-in.
2. Enable application permissions in the Sales application.

3. Notify your users to sign into the add-in once.

Add Application Permissions in Microsoft Azure

1. Sign in to Microsoft Azure.
2. Open the application you registered for the Oracle Microsoft 365 add-in.
3. Go to the **API Permissions** tab and click **Add a permission**.
4. Select **APIs my organization uses**.
5. Search for **office** and select **Office 365 Exchange Online**.
6. Click **Application Permissions** and add the permissions shown in this table:

Permission	Option to Select
Calendars	Calendars.ReadWrite.All
Contacts	Contacts.ReadWrite
Mail	Mail.ReadWrite
Mailbox Settings	MailboxSettings.ReadWrite
Tasks	Tasks.ReadWrite
User	User.Read.All

7. Click **Add Permissions**.
8. On the API permissions page, select **Grant admin consent** for each permission you added to consent on behalf of users.

Enable Application Permissions in the Sales Application

1. In the Setup and Maintenance work area, use the Manage Microsoft 365 task:
 - o Offering: Sales
 - o Functional Area: Integrations
 - o Task: Manage Microsoft 365
2. In Synchronization Settings, enable the **Enable Microsoft Application Permission** option.
3. Click **Save and Close**.

Why is my new custom field visible in the UI but not showing in BI?

It's not enough to publish the sandbox with the custom field. You must also edit the custom subject area and add the new field.

Related Topics

- [Create Custom Subject Areas](#)
- [Frequently Asked Questions \(FAQs\) for Custom Subject Areas](#)

How do I validate geographies of addresses against master geographies and generate naming references?

Use the Validate Geographies of Addresses Against Master Geographies scheduled process helps you validate an address against master geography data and generates geography naming references.

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

When to Use

This scheduled process validates address data against master geographies. This scheduled process checks whether geography elements of an address like state, city, postal code, are valid as per master geography data. It also stores Geography Name Referencing information for the address. Note that geography validation isn't the same as address verification. *Address Verification* depends upon Oracle or any third-party address verification services for verifying addresses.

You can run this scheduled process for the following reasons:

- When you must generate or refresh the geography naming references data for a location.
- After creating new locations or updating existing locations using import and when geography naming references generation at the time of creation is turned off.
- When the master geography hierarchy has changed after the geography naming references data is computed and we require to re-compute the geography naming references data.
- We recommend that the profile option value of the *HZ_POST_IMPORT_GNR_INVOKE profile option* is set to N. When this profile option value is set to N, the Validate Geographies of Addresses Against Master Geographies scheduled process isn't invoked after every import following bulk uploads. Instead, you must schedule this scheduled process every week during off peak hours. This helps improve the geography data import performance.
- Schedule this process after loading Persons or Employees in HCM.

The time taken to complete one instance of this scheduled process (GNR job) depends upon the following factors:

- The number of locations or addresses in the application
- The number of validation levels set for a given country
- The number of geographies for the given country

To process a large volume of addresses for a country using this scheduled process, fine tune the following profile options:

- **HZ_GNR_NUM_OF_WORKERS:** By default, the value of this profile option is 1. So only one worker job is created. Increase this number based on the number of jobs you want to use.
- **HZ_GNR_COMMIT_SIZE:** By default, the value of this profile option is 1000 records. Increase this number based on the number of records you want to process.

Privileges Required

Verify that you have the following privilege or role:

- Role:
 - Application Implementation Consultant
- Privilege:
 - Run Trading Community Geography Name Referencing Maintenance

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
 - Run this scheduled process whenever the geography naming references data for a location is generated or refreshed.
- Compatibility:
 - This process is self-incompatible and also incompatible with the Group Territory Geographies process.
 - If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.

Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Location Table Name	Mandatory	Specifies the table name containing the address records that you want to process.	HZ_LOCATIONS PER_ADDRESSES_F	None	The PER_ADDRESSES_F value works only for tax validation and not for address validation. For example, if you are using this GNR process in HCM and you select the PER_ADDRESSES_F option, then this scheduled processes can be used for tax purposes but not for validating employee addresses.
Run Type	Mandatory	Specifies the data set to be processed. Specify if you want to process all records, only records that previously resulted in error, or only new	ALL ERROR NEW	None	ALL-Validates all Locations Error-Re-validates erroneous records

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
		records that were never processed. The choice to process all records can take considerable amount of time to complete. In taxation applications, an upgrade parameter is available, if the application is installed at the time of upgrade. If you already processed all records or upgraded recently, you may select only the New or the Error parameter.			NEW-Validates new locations
Usage Code	Optional	Specifies the validation usage code. This parameter specifies whether the GEOGRAPHY or TAX validation must be run. Specify to run the program for either the tax or geography validation usage. The program provides results that correspond to validation rules associated with the selected usage.	GEOGRAPHY TAX	None	Use GEOGRAPHY for address validation.
Country Code	Optional	Specifies the ISO Country Code for which the process is run. Enter the country for which addresses must be processed.	Example: US	None	N/A
From Location ID	Optional	Specifies the beginning Location ID from which validation should be run	Numeric Value	From Location ID should be less than To Location ID	N/A
To Location ID	Optional	Specifies the ending Location ID till which validation should be run	Numeric Value	To Location ID should be greater than From Location ID	N/A
Start Date	Optional	Specifies the begin Location Effective Start Date	Date	Format : YYYY/MM/DD Example: 2019/12/24	N/A

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
				Start Date should be lower than End Date	
End Date	Optional	Specifies the begin Location Effective End Date	Date	Format : YYYY/MM/DD Example: 2019/12/24 End Date should be higher than Start Date	N/A

Geography Name Referencing (GNR) records are created for addresses based on the country structure for a particular country and the validations defined on that structure. The following table displays the relationship between validations defined and the creation of GNR records. It also shows how the records change when correct or incorrect data are provided as values for addresses.

Use Case	Address Validations Defined	Address	GNR Records	GNR Map Status
Correct data with no validations	None	Country: US State: CA City: Redwood City Postal Code: 94065	GNR record created for country	Success
Correct data with validations turned on for all levels	Country: US Validations Defined for: State, County, City, Postal Code	Country: US State: CA City: Redwood City Postal Code :94065	GNR Records created for country, state, county,city and postal code	Success
Correct date with validation defined only for last level	Country: US Validations Defined for: Postal Code	Country: US State: CA City: Redwood City Postal Code: 94065	GNR Records created for country, state, county,city and postal code	Success
Correct date with validation defined only for last level. Postal Code is unique and	Country: US	Country: US State: CA	GNR Records created for country, state, county,city and postal code.	Success

Use Case	Address Validations Defined	Address	GNR Records	GNR Map Status
falls within single city in the county.	Validations Defined for: Postal Code	City: Postal Code: 94065		
Correct data with validation on middle level	Country: US Validations Defined for: City	Country: US State: CA City: Redwood City Postal Code: 94065	GNR Records created for country, state, county,city and postal code	Success
Correct data with validation on middle level. Postal Code is unique and falls within single city in the county.	Country: US Validations Defined for: City	Country: US State: CA City: <NULL> Postal Code: 94065	GNR Records created for country, state, county,city and postal code .	Success
Incorrect data for last level with validation on middle level	Country: US Validations Defined for: City	Country: US State: NY City: New York Postal Code: 1111	GNR Records created for country, state, county and city	Success
Incorrect data for last levels with validation on middle level	Country: US Validations Defined for: State	Country: US State: CA City: Abc Postal Code: 94065	GNR Records created for country and state	Success
Incorrect data for last levels with validation on middle level	Country: US Validations Defined for: State	Country: US State: CA City: Redwood City Postal Code: 111	GNR Records created for country, state, county and city	Success

Use Case	Address Validations Defined	Address	GNR Records	GNR Map Status
Incorrect data for last level with validations turned on for all levels	Country: US Validations Defined for: State, County, City, Postal Code	Country: US State: CA City: Redwood City Postal Code: 10027 (assume 10027 postal code does not exist)	GNR Records created for: Country state county city	Error
Incorrect data for middle level followed by correct data on subsequent levels with validations turned on for all levels	Country: US Validations Defined for: State, County, City, Postal Code	Country: US State: CA City: Abc Postal Code: 94065	GNR Records created for: Country State	Error
Incorrect data for middle level with validation defined only for last level	Country: US Validations Defined for: Postal Code	Country: US State: CA City: Abc Postal Code: 94065	GNR Records created for country and state	Error
Correct data with validation defined only for last level. Same Postal Code is in two cities (which are in the same county).	Country: US Validations Defined for: Postal Code	Country: US State: CA City: <NULL> Postal Code: 94065	GNR Records created for Country, State, County	Error

Related Topics

- [How do I manage geography validation?](#)
- [Address Validation using Geography Naming Reference \(GNR\) Report](#)
- [Setting Up Geography Validation](#)
- [How can I save an address that didn't pass geography validation?](#)

What's the maximum number of custom objects that we can create using Application Composer?

There's no fixed limit on the number of custom objects that you can create using Application Composer.

What's the maximum number of mashups that we can create using Application Composer?

There is no technical restriction on the number of mashups allowed, since mashups are just iFrames embedded in a Fusion application.

Do I still need to run the Synchronize CRM Search Indexes process if I'm using Workspace?

No. Workspace and most of the Sales work areas use Adaptive Search, a different and newer search technology. You must run the Synchronize CRM Search Indexes process only if you're still using some of the legacy work areas that use the older CRM search.

How do I create a custom saved search to share with everyone?

After you create a custom saved search, it's initially visible only to you. Here's how to ensure that its shared with the whole sales organization when you've migrated the changes to your production environment.

1. Navigate to the work area from where you want to share your custom saved search.
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. From the **Shared With** list, select **Everyone**.
6. Click **Save**.

How many assignment subprocesses can be run for each Service server available in my environment?

The maximum number of subprocesses that can be run is based on the number of Service servers available in your environment. Each server can process a maximum of 16 subprocesses (threads).

For example, let's say that your Production environment shows 25 processes with record counts on each subprocess but your Development environment only shows 25 processes with record counts on 15 subprocesses. The other 10 subprocesses show a record count of 0. The totals and sum of the processes is correct for 15 subprocesses but 10 subprocesses show with 0 records. This is expected behavior based on the number of Service servers available in your environment. In our example, the Development environment has 1 server so when you submit a job with 25 processes, only a maximum of 16 subprocesses (threads) can start with no other process using any threads.

In the given scenario, 15 subprocesses started and 10 subprocesses are waiting to get the threads. Those 15 subprocesses did all the processing of records and that's why you'll see the behavior as outlined.

How do I create BI reports for past periods?

You can use the Time dimension in the subject areas to report on the desired dates. Keep in mind that to see the correct dates, you must have the accounting calendar set up in the application.

How do I import subscription product bill line data?

You can use import management to create or update Subscription Product Bill records.

To import Subscription Product Bill records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite setups are done, if applicable.

- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. If you're creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with 'Number' and usually visible in the business object's UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Subscription Product Bill object, the attributes are CoveredLevelPuid, PrePaymentNumber and SequenceNumber.

Required Attributes and Validations for Subscription Product Bill Object

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

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Bill Record	Updating an Existing Subscription Product Bill Record
DateBilledTo	The date up to which the subscription product is billed	This must be a valid date.	Required	Not required
RecurringFlag	Option indicating whether this line is recurring. Note: Pass recurring flag as 'Y' if you need to create Credit Memo.	Y or N	Required	Not required
BillingPeriod	The billing period	This must be a positive number and unique for the product.	Required	Not required
DateToInterface	The date to interface	This must be a valid date.	Not Required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Bill Record	Updating an Existing Subscription Product Bill Record
DateBilledFrom	The date from which the subscription product is billed	This must be a valid date.	Required	Not required
BillLineId	The bill line ID	Do not pass any value.	Not Required	Not required
InterfacedFlag	Option indicating whether the bill line is interfaced	Y or N	Required	Not required
SubscriptionProductPuid	The subscription product PUID	This must be a valid subscription product PUID.	Required	Not required
SubscriptionId	The subscription ID.	Do not pass any value.	Not Required	Not required
SubscriptionProductId	The subscription product ID.	Do not pass any value.	Not required	Not required
BillLinePuid	The bill line PUID.	This must be a unique bill line PUID.	Required	Required
Amount	The amount	This must be a positive number.	Required	Not required
UsageFlag	Option indicating whether the line is a usage line.	Y or N	Required	Not required
UsageAcquiredFlag	Option indicating whether the usage has been acquired.	Y or N	Not required	Not required
UsagePricedFlag	Option indicating whether usage line has been priced.	Y or N	Not required	Not required
TransactionClass	The transaction class.	This must be INV for invoice and CM for credit memo.	Required	Not required
TransactionTax	The transaction tax.	This must be a positive number.	Not required	Not required
TransactionAmount	The transaction amount.	This must be a positive number.	Not required	Not required
InvoiceBillLineId	The invoice bill line ID.	Do not pass any value.	Not required	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Subscription Product Bill Record	Updating an Existing Subscription Product Bill Record
UsageCaptureDate	The usage capture date.	This must be a valid date.	Not required	Not required
UsageQuantity	The usage quantity.	This must be a positive number.	Not required	Not required
ChargePeriod	The charge period.	This must be a valid charge period.	Not required	Not required
PricingError	The pricing error.	Do not pass any value.	Not required	Not required
ListPrice	The list price.	This must be a positive number when TransactionClass is INV and a number when it's CM.	Required	Not required
RevenueLineId	The revenue line ID.	Do not pass any value.	Not required	Not required
TransactionClassMeaning	The meaning of transaction class lookup.	Invoice or Credit Memo	Not required	Not required
InvoiceDate	The invoice date.	This must be a valid date.	Not required	Not required
NewCreditMemoPUIID	The credit memo PUIID.	Do not pass any value.	Not required	Not required
CreditMemoAmount	The credit memo amount.	Do not pass any value.	Not required	Not required
CreditMemoFlag	The credit memo option.	Do not pass any value.	Not required	Not required
CreditMemoReason	The credit memo reason.	Do not pass any value.	Not required	Not required
CustomerTrxTypeSequenceId	The customer transaction type sequence ID.	This must be a number.	Not required	Not required
CoveredLevelId	The covered level ID.	Do not pass any value.	Not required	Not required
ChargeId	The charge ID.	This must be a valid charge ID.	Required	Not required

You can view the Subscription Product Bill object along with all its child objects and attributes in the Manage Import Objects page of the Import Management flow. You can find attribute information like type, length, description, and so on, on this page.

Note: Total cost value (TCV) isn't automatically calculated while importing bill lines. You need to manually calculate it and add it to header and product level. You can automatically calculate the TCV and generate bill line by setting Generate Billing to Y in header.

Note: To import Subscription Bill Line Credit memo, you must include `BillLinePuid`, `CreditMemoAmount`, `CreditMemoFlag`, and `CreditMemoReason` attributes in the CSV file. The `BillLinePuid` should be the PUID of the existing Invoice Bill Line for which a Credit memo needs to be added.

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

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

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

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)

How can I enable the Mass Update feature in Workspace?

You can enable the Mass Update feature in Workspace using the Parameters tab available in the Adaptive Search setup page.

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

Here's how to edit Adaptive Search parameters to enable the mass update feature.

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to:
 - Offering: Sales
 - Functional Area: Sales Foundation
 - Task: Configure Adaptive Search
3. On the **Configure Adaptive Search** page, click the **Parameters** tab.
4. Highlight the **Enable Mass Update** parameter and click **Edit**. This warning is displayed.

`You're about to change parameters that control how Adaptive Search works.
Changes should only be carried out by search setup experts. Do you want to
continue?`

5. Click **Yes**.
6. In the **Current Value** field, change the default value of N (No) to Y (Yes) to turn on the mass update feature and click **Save and Close**.

Related Topics

- [How do I apply mass update to accounts and contacts?](#)
- [How do I enable mass update of records?](#)

How do I manage party usages?

Party Usages describe how parties can be used across the application in business flows. Use this procedure to create and edit party usages.

Create Party Usages

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Customer Data Management
 - Functional Area: Trading Community Foundation
 - Task: Manage Party Usages
2. Click **Actions > Create**.
3. Specify the following information in the Overview section of the page:
 - Specify the code for the party usage. You can't change the code of an existing party usage.
 - Specify a name.
 - Select the type of party usage.
 - (Optional) Provide a description.
4. Specify the following information in the Assignment section of the page:
 - If you have identified business events that can create an assignment to a party, select Restrict Manual Assignment.
 - If the bulk import or manual assignment can create an assignment, select Unconditional Assignment.
Note: The Unconditional Assignment isn't available for predefined party usages.
 - If you want to restrict only business events that you identified to update an assignment to a party, select Restrict Manual Update.
 - Select Relationship Causes Assignment to allow an assignment to a party if a party relationship is created.
 - (Optional) Provide descriptions.
5. In the Exclusivity Rules section, specify the from and to dates during which the party usage is assigned exclusively.
6. In the Incompatibility Rules section, select the party usages which can't be assigned along with the selected party usage. For example, you can specify for a prospect party usage that a party couldn't have a prospect usage and customer usage at the same time. You can also specify the time period during which the selected party usages can't be assigned.
7. In the Transition Rules section, specify the party usage which the selected party usage transitions to. You can also specify the time period when the transition starts and, optionally, ends. For example, when a party that currently has the applicant party usage is assigned the student party usage, the applicant usage is set with an end date.
8. Click **Save and Close**.

Edit Party Usages

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Customer Data Management
 - Functional Area: Trading Community Foundation
 - Task: Manage Party Usages
2. Click **Actions > Edit**.

3. Change the following information in the Overview section of the page:
 - Edit the name.
 - Edit the description as needed.
4. Select or clear the selection for the following information in the Assignment section of the page:
 - If you have identified business events that can create an assignment to a party, select Restrict Manual Assignment.
 - If the bulk import or manual assignment can create an assignment, select Unconditional Assignment.
Note: The Unconditional Assignment isn't available for predefined party usages.
 - If you want to restrict only business events that you identified to update an assignment to a party, select Restrict Manual Update.
 - Select Relationship Causes Assignment to allow an assignment to a party if a party relationship is created.
 - Edit or provide the descriptions.
5. Add or update from and to dates during which the party usage is assigned exclusively in the Exclusivity Rules section. Or, change or delete the existing dates.
6. Modify the party usages which can't be assigned along with the selected party usage in the Incompatibility Rules section. For example, you can specify for a prospect party usage that a party couldn't have a prospect usage and customer usage at the same time. You can also specify the time period during which the selected party usages can't be assigned. Or, change or delete the existing rules.
7. In the Transition Rules section, update the party usage which the selected party usage transitions to. You can also specify the time period when the transition starts and, optionally, ends. For example, when a party that currently has the applicant party usage is assigned the student party usage, the applicant usage is set with an end date. Or, change or delete existing transition rules.
8. Click **Save and Close**.

How can we use the Contains operator for the Accounts field while searching activities?

Use Workspace or Sales in the Redwood user experience for your searches. These newer interfaces, which use Adaptive Search, already include the Contains operator.

Can I change the accounting calendar after it's being used in transactions?

Once you set up your accounting calendar and start using it in transactions, you can't change it, like, for example, changing it from calendar year to fiscal year.

You usually create a single accounting calendar as part of your implementation. The accounting calendar defines the time periods used in the applications. When you create the calendar, you specify the exact dates for each period.

These defined periods, often called enterprise periods, are used for many purposes in the applications. Examples include:

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

Thus, after you have transactions created against your accounting calendar, you can't modify it.

How do I manage import objects?

Import Objects correlate with the tables in Oracle Applications. Understand import objects and their attributes to manage the data that you want to import. Objects for which you don't have license or access won't show up in the UI.

Import Object Details

Click **Tools > Import Management > Import Objects**. To see the details of an import object, select it on the Import Object Details page. Here are the details that you see about each importable object.

Column	Description
Display Name	The object as it's called in the User Interface.
Language Independent Code	The internal name of the object.
Parent Object	The parent object of the selected object. If there are multiple parents for an object, they're shown separated by comma.
View Hierarchy	Clicking on the View Hierarchy icon shows the hierarchy between the parent and child objects in a graphical format.
User Key	The attribute or the group of attributes that's used to uniquely identify a record.
Required Attributes	The attribute or the group of attributes for which values are required to create a record. These can't be NULL when updating a record.
Description	A short description of the object.
Download	Link to download the import object template files for each object and its child objects.

Target Attributes

Here are the details that you see for each target attribute.

Column	Description
Display Name	Name of the target attribute in the User Interface.
Attribute Name	Internal or field name of the attribute.
Required	Indicates whether the attribute is mandatory or not.
Default Value	The default value for the attribute, if any.
Type	Data type of the target attribute.
Length	Maximum allowed length for the target attribute values.
Description	A short description of the target attribute.

Related Topics

- [Define Objects](#)

What do I do if I can't see the account hierarchy in the Redwood user experience?

You must run the Refresh Denormalized Data for Account Hierarchy process to see the hierarchy.

Here's how to run the process:

1. From the Navigator open the Schedule Processes work area (**Navigator > Tools > Schedule Processes**).
2. Click **Schedule New Process**.
3. In the Schedule New Process window, click the **Search Name** (the down arrow button).
4. Scroll down to the end of the list and click **Search**.
5. In the **Name** field, enter: **Refresh Denormalized Data for Account Hierarchy**.
6. Click **Search**.
7. Select the row with the search result.
8. Click **OK** two times.
9. In the Process Details dialog box. Click the **Advanced** button.
10. Under Advanced Options, Parameters tab, set **Full Refresh** to **Yes**.
11. Go to Schedule tab and select the **Using a schedule** option
12. Select a frequency for the refresh. For example, if the hierarchy is changed often, select Daily, Weekly, or Monthly.
13. Click **Submit**.

Why can't I find the Service Requests tab for Accounts?

If the Service Requests subtab isn't visible in the Account object, check that it's enabled in Application Composer.

1. Navigate to Setup and Maintenance
2. Select **Service** as the **Offering**.
3. Click **Actions > Edit Implementation Status**.
4. Ensure that **Implemented** is selected.

When should I run the Adaptive Search publish process?

Adaptive Search requires several background processes to run periodically. Oracle recommends that you perform a full publish each time you do a production to test (P2T) environment refresh and when you change your Adaptive Search configuration.

Can I change how opportunity territory-based assignment automatically assigns by opportunity owner?

No, you can't change the standard default application behavior when assigning opportunity territories to the opportunity owner. However, if you want more territories to be assigned to an opportunity, for example based on revenue, then as a workaround, you can create customer centric territories using a product dimension.

After you set up your territories, territory-based assignment matches territory dimensions and attributes to work objects. You can set up territory-based assignment to be completely automated, to happen on-demand, or you can use a combination of these settings. Territory-based assignment requires that you set up your territories and resource hierarchy, set profile options to configure assignment, and run assignment processes.

In addition, you can also use rule-based assignment to set up more rules used to assign resources to work objects. Rule-based assignment lets you capture attributes not defined in territory-based assignment. Once you set up the rules containing conditions that records must meet, then resources get assigned to the object when they match the rule conditions.

Can I specify multiple parallel approvers when configuring my business process flow?

Yes. You can change the default template to design either a parallel or serial business process flow and save it as a new project. A parallel approval is where any one approval is enough from the approvers specified in the process flow.

A serial approval is where all the approvals are required sequentially from the specified approvers. See [Set Up Parallel Approval](#) for more information about creating an approval workflow that requires approval from a group of people, in any order.

Related Topics

- [Configure an Approval Process for Opportunities](#)

How can I create an address style format layout?

Click New in the Manage Address Formats page and add address lines in the Format Variation Layout section. If you require more than one address style format layout, then you can create a format variation and add a different address format layout.

How can I create a variation of an Address Style Format?

You can create different variations of an address style format, with each variation having its own layout.

For example, a country's postal address may have variations such as general postal address, rural address, and military address. When you create an address style format, the layout defined for the format is assigned as the default variation. Click **Add** in the Format Variation region of the Edit Address Style Format page, for the address style format, to add a variation of the Address style. For each address style format variation, you can enter a variation rank to define the priority of the variation.

What is a Batch Assignment Progress Report?

You can generate a batch assignment progress report to show you a variety of details about your assignment processes.

The batch assignment progress report indicates the number of records processed, unprocessed, successful or failed, and the number of records processed per minute for a process. The report provides details of assignment processing

for multiple batch assignment processes and their sub-processes. You can run this report while a batch assignment process (accounts, leads, opportunities, revenue, or partner accounts) is running, or after a process has completed.

Access the Diagnostic Dashboard to generate the batch assignment progress report. The report includes two tables, one with details of the main process, followed by details of the sub-processes. The second table with sub-processes appears only if the **Include Sub Process** parameter is set to **True**.

Input Parameters

The report has the following input parameters:

Input Parameter	Description
Parent Process ID	Identifiers for the parent scheduled processes. You can enter multiple process IDs.
From Date	Select the start date.
To Date	Select the end date.
Include Sub Processes	Select True to include sub-processes. The default value is False .

Example Report

Here is an example of a batch assignment progress report, along with description of what each value means:

Column	Sample Value	Description
Parent Process ID	504	Identifier for the scheduled process
Work Object	SalesAccount_Work_Object	Code for the work object
Candidate Object	SalesAccountTerritory_Candidate_Object	Code for the candidate object
Submitted By	Sales_admin	User name of the person submitting the process
Process Status	Running	Status of the process, such as, Not Started, In Progress, or Canceled
Process Start Time	11/19/12 8:48 PM UTC	Start Time of the process. Shows date, hours, and minutes
Process End Time	11/19/12 8:56 PM UTC	End Time of the process. Shows date, hours, and minutes

Column	Sample Value	Description
Process Elapsed Time (Minutes)	22	Number of minutes the process has been running
Records per Minute	10.46	Number of records processed per minute
Number of Sub Processes	10	Number of sub-processes launched from the parent process
Number of Records	100000	Number of records in the process
Number Not Processed	94452	Number of records not yet processed
Number Successful	5542	Number of records successfully processed
Number Failed	6	Number of records failed
Failure Rate	0.00006	Number of failures divided by the Number of items
Assignment Elapsed Time	21.45	Number of minutes the assignment processing has been running
Records Processed Last 10 Minutes	12.63	Number of records processed in the previous 10 minutes
Number of Retries	0	Number of times the process has been resubmitted

You can also use the report to estimate the time it will take to complete a batch assignment process. This report provides details on the number of records completed and the number of records in progress. You can generate this report repeatedly to conduct performance analysis of the batch assignment processing.

Related Topics

- [Example of Generating Assignment Reports](#)

How do I request account assignment?

Use the Request Account Assignment scheduled process to request territory assignments for specified accounts. An account represents a company or person you sell to. If your business sells to a contact or household, an account represents the contact and household you sell to.

Assignment manager lets you assign territories related to your sales accounts, including customers, prospective customers, individual contacts, and households. You can use assignment rules defined for accounts only to filter the territories that are assigned to accounts.

When to Use

Use this scheduled process in the following cases:

- By default, accounts are assigned automatically when the account is created or updated. Alternatively, sales people with access to the account team can run assignment for a specific account.
- You can run this scheduled process to run account assignments in bulk.
- You can run this scheduled process whenever there is a mass change in the account dimensional attributes. For example, change in address, organization type, organization size, auxiliary classifications, industries, and so on.
- You can run this scheduled process whenever there is any change in territory configuration.
- You can run this scheduled process after running Bulk import so that territories are assigned to the imported customers.
- Schedule this process if you don't auto assign territories but assign territories periodically.
- This scheduled process processes a set of accounts based on the view criteria chosen. For example, you can process all accounts modified after a particular date.
- If auto-assignment isn't enabled and this scheduled process isn't run, territories won't be assigned to accounts. The visibility of the accounts (view or edit access) is impacted, if you use territory-based data security.
- For a list of profile options that impact this feature, see the Related Topics section.

Privileges Required

Verify that you have the following roles or privileges:

- Roles:
 - Sales Administrator
- Privileges:
 - Run Sales Party Batch Assignment

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency
 - See the table containing the view criteria information in the Parameters section.
- Compatibility:
 - This scheduled process is incompatible with itself. These scheduled processes should not be requested to run in parallel against the same opportunity batch, to avoid potential locking issues.
 - Geography Name Referencing hierarchy data must be setup before running this scheduled process because the territory assignment uses Geography Name Referencing data.

- Ensure that groovy triggers aren't executed for user IDs that are used for assignments. If this check isn't performed, groovy triggers are executed for all accounts that get assigned and could lead to performance issues. For more information about these assignments, see the When are territories assigned to accounts topic in the Related Topics section.
- Multiple instances of this process running simultaneously can cause performance issues.
- Don't make any changes to the territory setup while running this scheduled process.

Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required
Work Object	Mandatory	Specify a predefined work object or the one you created.	Account	None
Candidate Object	Mandatory	Specify the candidate object.	Account Territory	None
Assignment Mode	Mandatory	Specify the assignment mode.	Territory	None
Rule Category Name	Optional	Specify if you're using rule-based assignment.	Don't select any value.	None
View Criteria Name	Mandatory	Specify a view criteria name from the View Criteria table.	See the View Criteria table.	None
View Criteria Bind Values	Optional	Specify the view criteria bind values of the associated view criteria name from the View Criteria table.	See the View Criteria table.	None
Replace Team	Optional	Specify the replace team information. This option isn't supported for Sales Account Assignment.	Yes or No	None
Number of Work Objects per Sub Process	Optional	It is recommended that this value isn't changed. This number depends upon the Maximum Sub Processes per Process parameter's value.	Thousand is the default value.	None
Maximum Sub Processes per Process	Optional	If the number objects created is less than 500 thousand, then leave the default option of 10 as the maximum number of sub	Ten is the default value.	None

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required
		processes per process. The following recommendation is only applicable for when this process is run for the first time or for a complete run for all objects. However, the next time you run the process, only the changed objects are processed. If you're executing incremental runs at periodic scheduled times, then there's no need to update the default value of 10. Oracle recommends changing this value if the number of objects is: - Between 500 thousand and 1 million objects enter 5 - Greater than 1 million objects, enter 10 - Greater than 5 million objects, enter 20 - Greater than 10 million objects, enter 30		
Metrics Logging Interval	Optional	Used for internal purpose only.	Don't change this value. 100 is the default value.	None
Test Data Parameters	Optional	Used for internal purpose only.	Don't change this value.	None
Diagnostic Mode	Optional	Used for troubleshooting purposes.	Not applicable.	None

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
SalesAccountsUpdatedSinceVC	Use this view criteria to assign accounts which haven't been previously assigned and have LAST_UPDATED_DATE is greater than or equals the specified date and (LAST ASSIGNED DATE is empty or LAST ASSIGNED DATE is less than or equal to the specified date.	BindLastUpdateDate= [YYYY-MM-DD HH:MM:SS]	Daily
SalesAccountsAssignedBeforeVC	Use this view criteria to reassign accounts which have been	BindLastAssignedDate= [YYYY-MM-DD]	Daily

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
	previously assigned and have LAST_ASSIGNED_DATE (in the ZCA_SALES_ACCOUNTS table) less than the specified date.	BindReassignmentBatchId =[Territory Reassignment Batch ID]	
SalesAccountTerritoryBatchReassign	Use this view criteria to reassign accounts impacted by the specified territory and territory dimensional realignment batch. This view criteria is also used internally to initiate immediate or automatic assignments after territory proposal activation and territory dimension updates.	BindReassignmentBatchId=[Territory Reassignment Batch ID]	Run as per business requirements
SalesAccountBulkImportVC	Use this view criteria to assign accounts created in a given customer import batch. This view criteria is also used internally to initiate immediate/automatic assignments after customer import.	BindReassignmentBatchId =[Import Activity ID]	Run as per business requirements
SalesAccountDimsForPartyVC	Use this view criteria to assign the account with the specified account ID.	BindPartyId = [Sales Account ID]	Run as per business requirements

Troubleshooting Information

Use this information to troubleshoot the scheduled process:

- Warning or errors are displayed and details are captured in the scheduled process.
- Use the Diagnostic mode for detailed analysis.
- Use the Batch Assignment Progress Report or the Batch Assignment Error Report to view the details. For more information about these reports, see the Related Topics section.

Related Topics

- [What is a Batch Assignment Progress Report?](#)
- [What is a Batch Assignment Error Report?](#)
- [When are territories assigned to accounts?](#)

What is a Batch Assignment Error Report?

Use assignment management functionality to generate batch assignment error report. The batch assignment error report provides details of the error and warning messages generated while processing individual records during batch assignment process.

The report provides a summary of the test input parameters and message details for each record that meets the input parameters. You can run this report while a batch assignment process (accounts, leads, opportunities, revenues, or partner accounts) is running, or after a process has completed.

Access the Diagnostic Dashboard to generate the batch assignment error report. The report shows the test parameters followed by two results tables. The first table provides a summary of the process, and the second table shows details of the records that meet the criteria entered when running the report.

Report Parameters

Here's a description of the input parameters used to generate the batch assignment error report.

Input Parameter	Description
Parent Process ID	Identifier for the parent ESS process. You can enter only a single process ID.
Assignment Status	Enter the status of the assignment, such as, error, succeeded, and so on. The default is error.
Work Object Public Unique Identifier	This is optional. The value that you enter here will depend on the Identifier Attribute of the work object being processed in a batch.
Range of Records	Enter the range of records in a process to report. The default value is the value set in the MOW_DTF_ERROR_REPORT_MAX_LIMIT profile option. You can change this profile option value in the Manage Administrator Profile Values setup task.

Example Report

Here's an example of the Process Summary section of a batch assignment error report:

Process Summary

Work Object	Candidate Object	Start Time	End Time
SalesAccount_Work_Object	SalesAccountTerritory_Candidate_Object	2013/2/11 12:13	2013/2/11 02:45

Here's an example of the Process Details section containing the records that meet the criteria entered when running the batch assignment error report:

Work Object Public Unique Identifier	Assignment Status	Message Details
1243213	Successful	Not applicable.
1728224	Error	225030 MOW_AMENG_AO_ASSERT_FAILED An error occurred while loading assignment object Sales_Account_Work_object. There's a mismatch between the view object definition

Work Object Public Unique Identifier	Assignment Status	Message Details
		in the assignment configuration and the actual view object definition used during assignment processing. Update and save the assignment object to register it with the latest view object definition.
1982663	Successful	Not applicable.
2392053	Successful	Not applicable.

Use the batch assignment error report to check if there were errors in the batch assignment process and if a particular work object record was processed.

Related Topics

- [Example of Generating Assignment Reports](#)

When are territories assigned to accounts?

Internal territories are assigned to accounts in the following scenarios.

- When accounts are created.
- When a sell-to address is added to an existing sales party.
- When accounts are imported in bulk.
- When certain attributes on accounts that correspond with territory assignment dimensions are updated.
- When batch assignment is run.
- When you select the Assign Territories menu action on the Sales Account Team node for the account
- When territories are realigned or when personnel leave the territory or the company.
- When a sales manager reassigns all the sales representative's account to a different owner that triggers the reassignment of territories for those accounts to the new owner.

Note: The following profile options decide whether territory assignment and reassignment is automatic for accounts. The default setting for both is YES.

- Sales Account Automatic Assignment on Create Enabled
- Sales Account Automatic Assignment on Update Enabled

Automatic assignments are always enabled following an import, party merge and territory realignment.

During initial implementation and migration, it's possible to create accounts before territories have been set up in the application. These accounts won't receive any territory assignment because there are no territories. These accounts need to be explicitly assigned when territories are configured and activated in the application. This is one exception which doesn't have immediate/automatic assignment. The recommendation is to run a batch assignment to assign these accounts created at the beginning of the implementation using the view criteria `SalesAccountsUpdatedSinceVC`.

When you make a field conditionally required on an account, then add the following Groovy script before adding your business logic:

```
if (userName=='FUSION_APPS_CRM_SOA_APPID' || userName()=='FUSION_APPS_CRM_ESS_APPID')  
return false
```

Partner territories get assigned to accounts in the following scenarios.

- When a partner-generated lead is approved, all partner territories associated with the partner-generated lead are automatically assigned to the account.
- Users with the privilege Manage Sales Party Partner Territory can assign partner territories from the account team UI.

Note: Territory Management must be implemented to use this feature.

Related Topics

- [Overview of Account Assignment Profile Options](#)
- [Account Territory Member Access](#)
- [How can I add territories to an account?](#)
- [Account Team Member Access Levels](#)

What is the security access difference for contacts created by Customer, Prospect, and Standalone types?

This topic lists the standalone data security predicates predefined for each of the business objects supported by Adaptive Search. Data security predicates provide access to object data, the access type, and the data to be accessed.

The data to be accessed can be All, a specific record, or a subset of the data.

Note: Adaptive Search doesn't support the use of custom data security policies. Customers must use Access Groups instead as described in the Securing CX Sales and Fusion Service guide.

The instance set defines the subset of data that limits the condition part of the data resource. For more information, see the Manage Database Resources section of the Securing CX Sales and Fusion Service guide.

ACCOUNT

This table lists the instance set name and associated description for the Account business object:

Instance Set Name	Instance Set Description	Required Action Set
HZPARTIESHZ197	Access the trading community organization for table HZ_PARTIES for a trading community organization that's a partner and the user is a member of the partner organization.	• View Sales Party • Read

Instance Set Name	Instance Set Description	Required Action Set
HZPARTIESZBS100105	Access the sales party for table HZ_PARTIES where they're in the management chain of the account owner.	- View Sales Party - Read
HZPARTIESZBS100106	Access the sales party for table HZ_PARTIES where they're the account owner.	- View Sales Party - Read
HZPARTIESZCM1	Access the sales party for table HZ_PARTIES where user is in the sales account team.	- View Sales Party - Read
HZPARTIESZCM8	Access the sales party for table HZ_PARTIES for all sales parties in the enterprise.	- View Sales Party - Read
HZPARTIESZCM133	Access the sales party for table HZ_PARTIES for all prospects in the enterprise.	- View Sales Party - Read
HZPARTIESZCM134	Access the sales party for table HZ_PARTIES for all customers in the enterprise.	- View Sales Party - Read
HZPARTIESZCM3	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who's on the sales account team.	- View Sales Party - Read
HZPARTIESZCM39	Access the sales party for table HZ_PARTIES where user is a member of the territory associated with the sales account.	- View Sales Party - Read
HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is in the sales account team with edit access.	- View Sales Party - Read
HZPARTIESZCM40	Access the sales party for table HZ_PARTIES where user is a member of the territory that's an ancestor of the territory associated with the sales account.	- View Sales Party - Read
HZPARTIESZCM44	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who's on the sales account team with edit access.	- View Sales Party - Read
HZPARTIESZCM45	Access the sales party for table HZ_PARTIES where user is in the sales account team with full access.	- View Sales Party - Read
HZPARTIESZCM46	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who's on the sales account team with full access.	- View Sales Party - Read

Instance Set Name	Instance Set Description	Required Action Set
HZPARTIESZCM51	Access the sales party for table HZ_PARTIES where user is the owner of the territory associated with the sales account.	- View Sales Party - Read
HZPARTIESZCM52	Access the sales party for table HZ_PARTIES where user is the owner of the territory that's an ancestor of the territory associated with the sales account.	- View Sales Party - Read
HZPARTIESZCA99968	Access the accounts where they're in access groups.	- View Sales Party - Read

ACTIVITY

This table lists the instance set name and associated description for the Activity business object:

Instance Set Name	Instance Set Description	Required Action Set
ZMMACTYACTIVITIESZMM1398	Access the activity for table ZMM_ACTY_ACTIVITIES where they're only an owner of an activity (1=1).	- View Activity - Read
ZMMACTYACTIVITIESZMM1399	Access the activity for table ZMM_ACTY_ACTIVITIES where they're only a delegator of an activity (1=1).	- View Activity - Read
ZMMACTYACTIVITIESZMM1400	Access the activity for table ZMM_ACTY_ACTIVITIES where they're in the management chain of an owner only of an activity.	- View Activity - Read
ZMMACTYACTIVITIESZMM1401	Access the activity for table ZMM_ACTY_ACTIVITIES where they're in the management chain of a delegator only of an activity.	- View Activity - Read
ZMMACTYACTIVITIESZMM1402	Access the activity for table ZMM_ACTY_ACTIVITIES where they're only a resource of an activity.	- View Activity - Read
ZMMACTYACTIVITIESZMM1403	Access the activity for table ZMM_ACTY_ACTIVITIES where they're in the management chain of a resource only of an activity.	- View Activity - Read
ZMMACTYACTIVITIESZMM1404	Access the activity for table ZMM_ACTY_ACTIVITIES where they're the owner of an account associated with an activity.	- View Activity - Read
ZMMACTYACTIVITIESZMM1405	Access the activity for table ZMM_ACTY_ACTIVITIES where they're on the sales account	- View Activity - Read

Instance Set Name	Instance Set Description	Required Action Set
	team and the sales account activity that's in their management hierarchy.	
ZMMACTYACTIVITIESZMM1406	Access the activity for table ZMM_ACTY_ACTIVITIES where they're on the sales account territory and the sales account activity that's in their territory hierarchy.	- View Activity - Read
ZMMACTYACTIVITIESZMM1408	Access the activity for table ZMM_ACTY_ACTIVITIES where they're on the opportunity team and the opportunity activity that's in their management hierarchy.	- View Activity - Read
ZMMACTYACTIVITIESZMM1409	Access the activity for table ZMM_ACTY_ACTIVITIES where they're on the opportunity territory and the opportunity activity that's in their territory hierarchy.	- View Activity - Read
ZMMACTYACTIVITIESZMM1410	Access the activity for table ZMM_ACTY_ACTIVITIES where they're on the lead team and the lead activity that's in their management hierarchy.	- View Activity - Read
ZMMACTYACTIVITIESZMM1411	Access the activity for table ZMM_ACTY_ACTIVITIES where they're on the lead territory and the lead activity that's in their territory hierarchy.	- View Activity - Read
ZMMACTYACTIVITIESZMM47	Access the activity for table ZMM_ACTY_ACTIVITIES for all template activities in the enterprise.	- View Activity - Read
ZMMACTYACTIVITIESZMM48	Access the activity for table ZMM_ACTY_ACTIVITIES where they're either a resource or a delegator of an activity.	- View Activity - Read
ZMMACTYACTIVITIESZMM49	Access the activity for table ZMM_ACTY_ACTIVITIES where they're either a resource or a delegator of a task or an owner or a delegator of an appointment or an owner or a delegator of a call report activity.	- View Activity - Read
ZMMACTYACTIVITIESZMM50	Access the activity for table ZMM_ACTY_ACTIVITIES where they're either the owner or a delegator of an activity.	- View Activity - Read
ZMMACTYACTIVITIESZMM51	Access the activity for table ZMM_ACTY_ACTIVITIES where they're in the management chain of an activity resource.	- View Activity - Read
ZMMACTYACTIVITIESZMM52	Access the activity for table ZMM_ACTY_ACTIVITIES where they're in the management	View Activity

Instance Set Name	Instance Set Description	Required Action Set
	chain for a task activity or they're an owner for an appointment activity.	Read
ZMMACTYACTIVITIESZMM53	Access the activity for table ZMM_ACTY_ACTIVITIES where they're in the management chain of the activity owner.	- View Activity - Read
ZMMACTYACTIVITIESZMM54	Access the activity for table ZMM_ACTY_ACTIVITIES for all activities in the enterprise.	- View Activity - Read
ZMMACTYACTIVITIESZMM74	Access the activity for table ZMM_ACTY_ACTIVITIES where they're a participant on the activity.	- View Activity - Read
ZMMACTYACTIVITIESZMM75	Access the activity for table ZMM_ACTY_ACTIVITIES where they're either a resource or a delegator of a task or an owner or a delegator of an appointment or a call report activity.	- View Activity - Read
ZMMACTYACTIVITIESZMM76	Access the activity for table ZMM_ACTY_ACTIVITIES where partner users are resources in the activity.	- View Activity - Read
ZMMACTYACTIVITIESZMM77	Access the activity for table ZMM_ACTY_ACTIVITIES can edit all activities where users from their partner company are participating.	- View Activity - Read
ZMMACTYACTIVITIESZMM1413	Access the activity for table ZMM_ACTY_ACTIVITIES where they're in the management chain of a resource for the primary contact of an activity.	- View Activity - Read
ZMMACTYACTIVITIESZMM1414	Access the activity for table ZMM_ACTY_ACTIVITIES where they're member of a partner territory.	- View Activity - Read

ASSET

This table lists the instance set name and associated description for the Asset business object:

Instance Set Name	Instance Set Description	Required Action Set
ZCAASSETZCM213	Access the Asset for table ZCA_ASSET where user is a sales party team member of the asset owner party.	- View Asset - Read
ZCAASSETZCM214	Access the Asset for table ZCA_ASSET where user is in the management chain of a resource who's a sales party team member of the asset owner party.	- View Asset - Read

Instance Set Name	Instance Set Description	Required Action Set
ZCAASSETZCM215	Access the Asset for table ZCA_ASSET where user is a member of the territory associated with the asset owner party.	• View Asset • Read
ZCAASSETZCM216	Access the Asset for table ZCA_ASSET where user is a member of the territory that's an ancestor of the territory associated with the asset owner party.	• View Asset • Read
ZCAASSETZCM224	Access the Asset for table ZCA_ASSET where user is in the management chain of a resource who's a sales party team member of the asset owner party with edit access.	• View Asset • Read
ZCAASSETZCM228	Access the Asset for table ZCA_ASSET where user is in the management chain of a resource who's a sales party team member of the asset owner party with full access.	• View Asset • Read
ZCAASSETZCM252	Access the Asset for table ZCA_ASSET where user is owner of the territory associated with the asset owner party.	• View Asset • Read
ZCAASSETZCM253	Access the Asset for table ZCA_ASSET where user is a owner of the territory that's an ancestor of the territory associated with the asset owner party.	• View Asset • Read
ZCAASSETZCM254	Access the Asset for table ZCA_ASSET where user is a sales party team member of the asset owner party with edit access.	• View Asset • Read
ZCAASSETZCM255	Access the Asset for table ZCA_ASSET where user is a sales party team member of the asset owner party with full access.	• View Asset • Read
ZCAASSETZCM266	Access the Asset for table ZCA_ASSET all assets in the enterprise where asset owner party is a prospect.	• View Asset • Read
ZCAASSETZCM268	Access the Asset for table ZCA_ASSET all assets in the enterprise where asset owner party is a customer.	• View Asset • Read

CAMPAIGN

This table lists the instance set name and associated description for the Campaign business object:

Instance Set Name	Instance Set Description	Required Instance Name
MKTCAMPAIGNSZCA100054	Access groups can view marketing integration campaigns as a member of an access group associated to the marketing integration campaign.	• View Marketing Integration Campaign • Read

CASE

This table lists the instance set name and associated description for the Case business object:

Instance Set Name	Instance Set Description	Required Instance Name
SVCCASESSVC330	Access the cases for table SVC_CASES where the case is assigned to them or their subordinate.	• View Case Header • Read
SVCCASEMESSAGESSVC322	Access the case messages for table SVC_CASE_MESSAGES where they're the creator of a message.	• View Case Header • Read

COMPETITOR

This table lists the instance set name and associated description for the Competitor business object:

Instance Set Name	Instance Set Description	Required Instance Name
HZPARTIESZCA100184	Access the trading community party for table HZ_PARTIES a member of an access group associated to the sales competitor.	• View Sales Party • Read

CONTACT

This table lists the instance set name and associated description for the Contact business object:

Instance Set Name	Instance Set Description	Required Instance Name
HZPARTIESHZ196	Access the trading community person for table HZ_PARTIES for all people in the enterprise (1=1). Ensure that View Sales Party action is enabled.	• View Sales Party • Read
HZPARTIESHZ198	Access the trading community person for table HZ_PARTIES for their trading community person record.	• View Sales Party • Read
HZPARTIESHZ199	Access the trading community person for table HZ_PARTIES for all persons who are a member of their partner organization.	• View Sales Party • Read

Instance Set Name	Instance Set Description	Required Instance Name
HZPARTIESZBS100105	Access the sales party for table HZ_PARTIES where they're in the management chain of the account owner.	- View Sales Party - Read
HZPARTIESZBS100106	Access the sales party for table HZ_PARTIES where they're the account owner.	- View Sales Party - Read
HZPARTIESZBS100108	Access the sales party for table HZ_PARTIES for all customer contacts where they're in the management chain of a resource who's on the account team of at least one related account.	- View Sales Party - Read
HZPARTIESZBS100116	Access the sales party for table HZ_PARTIES for all customer contacts where they're a member of a territory associated with at least one related account.	- View Sales Party - Read
HZPARTIESZBS100118	Access the sales party for table HZ_PARTIES for all customer contacts where they're a member of an ancestor territory to a territory associated with at least one related account.	- View Sales Party - Read
HZPARTIESZBS100119	Access the sales party for table HZ_PARTIES for all customer contacts where they're in the management chain of a resource who's on the account team of at least one related account with full access.	- View Sales Party - Read
HZPARTIESZBS100120	Access the sales party for table HZ_PARTIES for all customer contacts where they're in the management chain of a resource who's on the account team of at least one related account with edit access.	- View Sales Party - Read
HZPARTIESZCM1	Access the sales party for table HZ_PARTIES where user is in the sales account team.	- View Sales Party - Read
HZPARTIESZCM133	Access the sales party for table HZ_PARTIES for all prospects in the enterprise.	- View Sales Party - Read
HZPARTIESZCM134	Access the sales party for table HZ_PARTIES for all customers in the enterprise.	- View Sales Party - Read
HZPARTIESZCM169	Access the sales party for table HZ_PARTIES for all customer contacts where they're in the account team of at least one related account with edit access.	- View Sales Party - Read
HZPARTIESZCM170	Access the sales party for table HZ_PARTIES for all customer contacts where they're in the	View Sales Party

Instance Set Name	Instance Set Description	Required Instance Name
	account team of at least one related account with full access.	Read
HZPARTIESZCM173	Access the sales party for table HZ_PARTIES for all customer contacts where they're in the account team of at least one related account.	- View Sales Party - Read
HZPARTIESZCM3	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who's on the sales account team.	- View Sales Party - Read
HZPARTIESZCM39	Access the sales party for table HZ_PARTIES where user is a member of the territory associated with the sales account.	- View Sales Party - Read
HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is in the sales account team with edit access.	- View Sales Party - Read
HZPARTIESZCM40	Access the sales party for table HZ_PARTIES where user is a member of the territory that's an ancestor of the territory associated with the sales account.	- View Sales Party - Read
HZPARTIESZCM44	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who's on the sales account team with edit access.	- View Sales Party - Read
HZPARTIESZCM45	Access the sales party for table HZ_PARTIES where user is in the sales account team with full access.	- View Sales Party - Read
HZPARTIESZCM46	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who's on the sales account team with full access.	- View Sales Party - Read
HZPARTIESZCM51	Access the sales party for table HZ_PARTIES where user is the owner of the territory associated with the sales account.	- View Sales Party - Read
HZPARTIESZCM52	Access the sales party for table HZ_PARTIES where user is the owner of the territory that's an ancestor of the territory associated with the sales account.	- View Sales Party - Read
HZPARTIESZCM158	Access the Contacts with one party usage.	- View Sales Party - Read

Instance Set Name	Instance Set Description	Required Instance Name
HZPARTIESZCM415	Access the Contacts which aren't created by Partner User.	- View Sales Party - Read
HZPARTIESZCA99972	Access the Contacts where they're in access groups.	- View Sales Party - Read

CUSTOM

This table lists the instance set name and associated description for the Custom object business object:

Instance Set Name	Instance Set Description	Required Instance Set
ZCX_OWNER_[OBJECT_NAME]	Access the Custom Object where the user is Owner of the Custom Object.	Read
ZCX_MGR_HIER_[OBJECT_NAME]	Access the Custom Object where the user is in management chain of the Owner of the Custom Object	Read

DEAL REGISTRATION

This table lists the instance set name and associated description for the Deal Registration business object:

Instance Set Name	Instance Set Description	Required Instance Set
MKLDMDDEALSMKL1500	Access the deal registration summary for table MKL_DM_DEALS for all deal registrations in the enterprise.	- View Deal Registration - Read
MKLDMDDEALSMKL4021	Access the deal registration summary for table MKL_DM_DEALS where they're a resource on the deal team with view, edit or full access.	- View Deal Registration - Read
MKLDMDDEALSMKL5049	Access the deal registration summary for table MKL_DM_DEALS where they're in the partner organization.	- View Deal Registration - Read
MKLDMDDEALSZCA100002	Access the deal registration summary for table MKL_DM_DEALS a member of an access group associated with the deal registration.	- View Deal Registration - Read

HR HELP DESK REQUEST

This table lists the instance set name and associated description for the HR Help Desk Request business object:

Instance Set Name	Instance Set Description	Required Instance Set
SVCSERVICEREQUESTSSVC460	Access the service request header for table SVC_SERVICE_REQUESTS for all HRHD service requests(1=1).	Read
SVCSERVICEREQUESTSSVC489	Access the service request header for table SVC_SERVICE_REQUESTS where they're the primary contact of the HRHD service request.	Read
SVCSERVICEREQUESTSSVC514	Access the service request header for table SVC_SERVICE_REQUESTS where the HRHD service request is assigned to them.	Read
SVCSERVICEREQUESTSSVC486	Access the service request header for table SVC_SERVICE_REQUESTS where they created the HRHD service request.	Read
SVCSERVICEREQUESTSSVC515	Access the service request header for table SVC_SERVICE_REQUESTS where they're a member of HRHD service request team.	Read
SVCSERVICEREQUESTSSVC519	Access the service request header for table SVC_SERVICE_REQUESTS where the HRHD service request is assigned to them or their subordinate.	Read
SVCSERVICEREQUESTSSVC520	Access the service request header for table SVC_SERVICE_REQUESTS where they or their subordinate is a member of HRHD service request team.	Read
SVCSERVICEREQUESTSSVC516	Access the service request header for table SVC_SERVICE_REQUESTS where the HRHD service request is assigned to a queue that they're a member.	Read
SVCSERVICEREQUESTSSVC476	Access the service request header for table SVC_SERVICE_REQUESTS where the HRHD service request is assigned to a queue that they or their subordinate is a member.	Read

INSTALLED BASED ASSET

This table lists the instance set name and associated description for the Installed Based Asset business object:

Instance Set Name	Instance Set Description	Required Instance Set
CSEASSETSBSVC605	Access the installed base asset for table CSE_ASSETS_B for all enterprise assets.	- Manage Installed Base Asset - Read

Instance Set Name	Instance Set Description	Required Instance Set
CSEASSETSBSVC437	Access the installed base asset for table CSE_ASSETS_B for all installed base assets where they're listed as the contact on the asset account team that owns the asset.	- Manage Installed Base Asset - Read
CSEASSETSBSVC438	Access the installed base asset for table CSE_ASSETS_B for all installed base assets where they're listed as the primary contact on the asset.	- Manage Installed Base Asset - Read
CSEASSETSBSVC439	Access the installed base asset for table CSE_ASSETS_B for all installed base assets where they're a manager for the account listed on the asset.	- Manage Installed Base Asset - Read
CSEASSETSBSVC434	Access the installed base asset for table CSE_ASSETS_B for all customer assets.	- Manage Installed Base Asset - Read

INTERNAL SERVICE REQUEST

This table lists the instance set name and associated description for the Internal Service Request business object:

Instance Set Name	Instance Set Description	Required Instance Set
SVCSERVICEREQUESTSSVC273	Access the service request header for table SVC_SERVICE_REQUESTS for all internal help desk service requests (1=1).	Read
SVCSERVICEREQUESTSSVC289	Access the service request header for table SVC_SERVICE_REQUESTS where the internal help desk service request is assigned to them or their subordinate.	Read
SVCSERVICEREQUESTSSVC290	Access the service request header for table SVC_SERVICE_REQUESTS where they're the primary contact of the internal help desk service request.	Read
SVCSERVICEREQUESTSSVC311	Access the service request header for table SVC_SERVICE_REQUESTS where the internal help desk service request is assigned to them.	Read
SVCSERVICEREQUESTSSVC291	Access the service request header for table SVC_SERVICE_REQUESTS where they created the internal help desk service request.	Read
SVCSERVICEREQUESTSSVC312	Access the service request header for table SVC_SERVICE_REQUESTS where they're a member of internal help desk service request team.	Read

Instance Set Name	Instance Set Description	Required Instance Set
SVCSERVICEREQUESTSSVC292	Access the service request header for table SVC_SERVICE_REQUESTS where they or their subordinate is a member of internal help desk service request team.	Read
SVCSERVICEREQUESTSSVC310	Access the service request header for table SVC_SERVICE_REQUESTS where the internal help desk service request is assigned to a queue that they're a member.	Read
SVCSERVICEREQUESTSSVC288	Access the service request header for table SVC_SERVICE_REQUESTS where the internal help desk service request is assigned to a queue that they or their subordinate is a member of HRHD Service Request.	Read

LEAD

This table lists the instance set name and associated description for the Lead business object:

Instance Set Name	Instance Set Description	Required Set Instance
MKLLMLEADSMKL1	Access the sales lead for table MKL_LM_LEADS where they're a resource in the lead sales team.	- View Sales Lead - Read
MKLLMLEADSMKL10	Access the sales lead for table MKL_LM_LEADS where they're a resource in the territory assigned to the sales lead.	- View Sales Lead - Read
MKLLMLEADSMKL104	Access the sales lead for table MKL_LM_LEADS where they're the owner of the sales lead.	- View Sales Lead - Read
MKLLMLEADSMKL114	Access the sales lead for table MKL_LM_LEADS where they're a resource in the lead sales team with full access.	- View Sales Lead - Read
MKLLMLEADSMKL129	Access the sales lead for table MKL_LM_LEADS where they're a territory resource in the sales lead territory team or a territory resource with a descendant territory in the sales lead territory team.	- View Sales Lead - Read
MKLLMLEADSMKL138	Access the sales lead for table MKL_LM_LEADS for all retired leads in the enterprise.	- View Sales Lead - Read
MKLLMLEADSMKL148	Access the sales lead for table MKL_LM_LEADS for all partner leads in the enterprise.	- View Sales Lead - Read

Instance Set Name	Instance Set Description	Required Set Instance
MKLLMLEADSMKL15	Access the sales lead for table MKL_LM_LEADS where they're a manager in the management hierarchy of a resource in the lead sales team with full access.	- View Sales Lead - Read
MKLLMLEADSMKL152	Access the sales lead for table MKL_LM_LEADS for all sales leads in the business units that they're authorized.	- View Sales Lead - Read
MKLLMLEADSMKL16	Access the sales lead for table MKL_LM_LEADS where they're a manager in the management hierarchy of the owner of the sales lead.	- View Sales Lead - Read
MKLLMLEADSMKL22	Access the sales lead for table MKL_LM_LEADS where they're a manager in the management hierarchy of a resource in the lead sales team.	- View Sales Lead - Read
MKLLMLEADSMKL310	Access the sales lead for table MKL_LM_LEADS where they're in the management hierarchy of the owner of the lead.	- View Sales Lead - Read
MKLLMLEADSZBS902	Access the sales lead for table MKL_LM_LEADS where they're member or in management chain of lead sales team, member of territory team or upward territory hierarchy.	- View Sales Lead - Read
MKLLMLEADSZCA99964	User can view lead for their access groups.	- View Sales Lead - Read

OPPORTUNITY

This table lists the instance set name and associated description for the Opportunity business object:

Instance Set Name	Instance Set Description	Required Instance Set
MOOOPTYMOO119	Access the opportunity for table MOO_OPTY for the selected records where I am on the team on the sales UI.	- View Opportunity - Read
MOOOPTYMOO120	Access the opportunity for table MOO_OPTY for the selected records I own on the sales UI.	- View Opportunity - Read
MOOOPTYMOO121	Access the opportunity for table MOO_OPTY for the selected records my subordinates own on the sales UI.	- View Opportunity - Read
MOOOPTYMOO122	Access the opportunity for table MOO_OPTY for the selected records where my subordinates are on the team on the sales UI.	- View Opportunity - Read

Instance Set Name	Instance Set Description	Required Instance Set
MOOOPTYMOO123	Access the opportunity for table MOO_OPTY for the selected records in my territory on the sales UI.	- View Opportunity - Read
MOOOPTYMOO124	Access the opportunity for table MOO_OPTY for the selected records in my territory hierarchy on the sales UI.	- View Opportunity - Read
MOOOPTYMOO88	Access the opportunity for table MOO_OPTY for all opportunities in the enterprise (1=1).	- View Opportunity - Read
MOOPTYZBS99903	Access the opportunity for table MOO_OPTY where they're a member or in a management chain of opportunity sales team with view, edit or full access, member of territory team or upward territory hierarchy.	- View Opportunity - Read
MOOPTYZBS99904	Access the opportunity for table MOO_OPTY where they're a member or in management chain of opportunity account team, account territory team or upward territory hierarchy.	- View Opportunity - Read
MOO_OPTYACCTERR_HIER_RES	Access the opportunity for table MOO_OPTY where they're a territory resource in the opportunity sales account territory team or a territory resource with a descendant territory in the opportunity sales account territory team.	- View Opportunity - Read
MOO_OPTY_ADMIN_SALES_ADMIN	Access the opportunity for table MOO_OPTY for all opportunities in the business units that they're authorized within.	- View Opportunity - Read
MOO_OPTY_EDIT_OPTYTEAM_MGR	Access the opportunity for table MOO_OPTY where they're in the management chain of an opportunity sales team member with edit or full access.	- View Opportunity - Read
MOO_OPTY_EDIT_OPTYTEAM_REPS	Access the opportunity for table MOO_OPTY where they're an opportunity sales team member with edit or full access.	- View Opportunity - Read
MOO_OPTY_FULL_OPTYTEAM_MGR	Access the opportunity for table MOO_OPTY where they're in the management chain of an opportunity sales team member with full access.	- View Opportunity - Read
MOO_OPTY_FULL_OPTYTEAM_REPS	Access the opportunity for table MOO_OPTY where they're an opportunity sales team member with full access.	- View Opportunity - Read

Instance Set Name	Instance Set Description	Required Instance Set
MOO_OPTY_TERR_HIER_RES	Access the opportunity for table MOO_OPTY where they're a territory resource in the opportunity territory team or a territory resource with a descendant territory in the opportunity territory team.	- View Opportunity - Read
MOO_OPTY_VIEW_ACCTTEAM_MGR	Access the opportunity for table MOO_OPTY where they're in the management chain of an opportunity sales account team member.	- View Opportunity - Read
MOO_OPTY_VIEW_ACCTTEAM_REPS	Access the opportunity for table MOO_OPTY where they're a member of the opportunity sales account team.	- View Opportunity - Read
MOO_OPTY_VIEW_OPTYTEAM_MGR	Access the opportunity for table MOO_OPTY where they're in the management chain of an opportunity sales team member with view, edit, or full access.	- View Opportunity - Read
MOO_OPTY_VIEW_OPTYTEAM_REPS	Access the opportunity for table MOO_OPTY where they're an opportunity sales team member with view, edit, or full access.	- View Opportunity - Read
MOOOPTYZCA99962	User can view Opportunities where they're in access groups.	- View Opportunity - Read

PARTNER

This table lists the instance set name and associated description for the Partner business object:

Instance Set Name	Instance Set Description	Required Action Set
HZPARTIESHZ521	Access the Partner where the user is the owner of the Partner Account.	Read
HZPARTIESHZ522	Access the Partner where the user is in management chain of the owner of the Partner Account.	Read
HZPARTIESHZ523	Access the Partner where the user is a member of the Partner Account team.	Read
HZPARTIESHZ524	Access the Partner where the user is in management chain of the member of the Partner Account team.	Read
HZPARTIESHZ525	Access the Partner where the user is an owner or member of the Territory assigned to the Partner Account.	Read

Instance Set Name	Instance Set Description	Required Action Set
HZPARTIESHZ526	Access the Partner where the user is a member of the territory and a descendant territory is assigned to the Partner Account.	Read
HZPARTIESHZ197	Access the Partner where user is a member of partner organization.	Read
HZPARTIESZCA99978	User can view Partner where they're in access groups.	Read

PARTNER CONTACT

This table lists the instance set name and associated description for the Partner Contact business object:

Instance Set Name	Instance Set Description	Required Instance Set
HZPARTIESHZ530	Access the Partner Contact where the user is a member of the Partner Account team.	Read
HZPARTIESHZ531	Access the Partner Contact where the user is in management chain of the member of the Partner Account team.	Read
HZPARTIESHZ532	Access the Partner Contact where the user is Owner of the Partner Account.	Read
HZPARTIESHZ533	Access the Partner Contact where the user is in management chain of the Owner of Partner Account.	Read
HZPARTIESHZ534	Access the Partner Contact where the user is a member of the Territory assigned to the Partner Account.	Read
HZPARTIESHZ535	Access the Partner Contact where the user is a member of the territory and a descendant territory is assigned to the Partner Account.	Read

QUOTES AND ORDERS

This table lists the instance set name and associated description for the Quotes and Orders business object:

Instance Set Name	Instance Set Description	Required Instance Set
ZCASALEORDERHEADERSZBS999939	Access the sales order for table ZCA_SALES_ORDER_HEADERS where they're a member	View Sales Order

Instance Set Name	Instance Set Description	Required Instance Set
	or in management chain of associated opportunity sales team with view, edit or full access, member of territory team or upward territory hierarchy.	Read
ZCASALEORDERHEADERSZBS999941	Access the sales order for table ZCA_SALES_ORDER_HEADERS where they're member or in management chain of associated opportunity account team, account territory team or upward territory hierarchy.	- View Sales Order - Read
ZCASALEORDERHEADERSZBS999948	Access the sales order for table ZCA_SALES_ORDER_HEADERS for all associated opportunities in the business units that they're authorized within 1=1.	- View Sales Order - Read
ZCASALEORDERHEADERSZPM5322	Access the sales order for table ZCA_SALES_ORDER_HEADERS for all associated opportunities having a partner organization.	- View Sales Order - Read
ZCASALEORDERHEADERSZPM5325	Access the sales order for table ZCA_SALES_ORDER_HEADERS where they're in the management chain of an associated opportunity sales team member with view, edit, or full access.	- View Sales Order - Read
ZCASALEORDERHEADERSZPM5326	Access the sales order for table ZCA_SALES_ORDER_HEADERS where they're an associated opportunity sales team member with view, edit, or full access.	- View Sales Order - Read
ZCASALEORDERHEADERSZPM5329	Access the sales order for table ZCA_SALES_ORDER_HEADERS where they're a member of a partner resource organization whose partner organization is on the associated opportunity.	- View Sales Order - Read

QUOTE AND ORDER LINE

The Quote and Order Line object follows the same security requirements as the Quote and Order Line business object.

SERVICE REQUEST

This table lists the instance set name and associated description for the Service Request business object:

Instance Set Name	Instance Set Description	Required Instance Set
SVCSEVICEREQUESTSSVC1	Access the service request header for table SVC_SERVICE_REQUESTS for all customer relationship management service requests (1=1).	Read

Instance Set Name	Instance Set Description	Required Instance Set
SVCSERVICEREQUESTSSVC12	Access the service request header for table SVC_SERVICE_REQUESTS where the customer relationship management service request is assigned to them or their subordinate.	Read
SVCSERVICEREQUESTSSVC13	Access the service request header for table SVC_SERVICE_REQUESTS where they or their subordinate is a member of customer relationship management service request team.	Read
SVCSERVICEREQUESTSSVC14	Access the service request header for table SVC_SERVICE_REQUESTS where they or their subordinate is a member of customer relationship management service request account team.	Read
SVCSERVICEREQUESTSSVC242	Access the service request header for table SVC_SERVICE_REQUESTS where the customer relationship management service request is assigned to a queue that they're a member.	Read
SVCSERVICEREQUESTSSVC32	Access the service request header for table SVC_SERVICE_REQUESTS where the customer relationship management service request is for a partner.	Read
SVCSERVICEREQUESTSSVC35	Access the service request header for table SVC_SERVICE_REQUESTS where their partner account is on the customer relationship management service request.	Read
SVCSERVICEREQUESTSSVC70	Access the service request header for table SVC_SERVICE_REQUESTS where they created the customer relationship management service request or are a member of customer relationship management service request contact list.	Read

TERRITORY

This table lists the instance set name and associated description for the Territory business object:

Instance Set Name	Instance Set Description	Required Instance Set
MOTTERRITORIESMOT1	Access the sales territory for table MOT_TERRITORIES where they're the territory owner.	- View Sales Territory - Read
MOTTERRITORIESMOT2	Access the sales territory for table MOT_TERRITORIES where they're the owner of a parent territory in the territory hierarchy.	- View Sales Territory - Read

Instance Set Name	Instance Set Description	Required Instance Set
MOTTERRITORIESMOT4	Access the sales territory for table MOT_TERRITORIES where they're an administrator of the territory.	- View Sales Territory - Read
MOTTERRITORIESMOT5	Access the sales territory for table MOT_TERRITORIES where they're an administrator of a parent territory in the territory hierarchy.	- View Sales Territory - Read
MOTTERRITORIESMOT26	Access the sales territory for table MOT_TERRITORIES where they're a member of the territory team.	- View Sales Territory - Read
MOTTERRITORIESZCA100084	Access the sales territory for table MOT_TERRITORIES where they're a member of an access group associated to the sales territory with read access.	- View Sales Territory - Read

WORK ORDER

This table lists the instance set name and associated description for the Work Order business object:

Instance Set Name	Instance Set Description	Required Instance Set
SVCWORKORDERS SVC214	Access the field service work order for table SVC_WORK_ORDERS where the field service work order is standalone or associated with a service request.	Read
SVCWORKORDERS SVC216	Access the field service work order for table SVC_WORK_ORDERS where they or their subordinate is a member of the field service work order account team.	Read
SVCWORKORDERS SVC217	Access the field service work order for table SVC_WORK_ORDERS where they or their subordinate is a member of the field service work order contact team.	Read
SVCWORKORDERS SVC219	Access the field service work order for table SVC_WORK_ORDERS where they or their subordinate is a member of the service request team associated with the field.	Read
SVCWORKORDERS SVC220	Access the field service work order for table SVC_WORK_ORDERS where they or their subordinate created the service request associated with the field service work order.	Read
SVCWORKORDERS SVC221	Access the field service work order for table SVC_WORK_ORDERS where they or their	Read

Instance Set Name	Instance Set Description	Required Instance Set
	subordinate created the field service work order.	
SVCWORKORDERSSVC222	Access the field service work order for table SVC_WORK_ORDERS where they or their subordinate is assigned to a field service work order.	Read
SVCWORKORDERSSVC223	Access the field service work order for table SVC_WORK_ORDERS where their partner account is on the field service work order.	Read
SVCWORKORDERSSVC224	Access the field service work order for table SVC_WORK_ORDERS where the field service work order is for a partner account.	Read
SVCWORKORDERSSVC246	Access the field service work order for table SVC_WORK_ORDERS where they or their subordinate is the technician assigned to a field service work order.	Read
SVCWORKORDERSSVC455	Access the field service work order for table SVC_WORK_ORDERS where they or their subordinate is the technician assigned to a field service work order.	Read

How to make Email and Primary Phone fields mandatory in contact?

You can add email addresses for accounts or contacts using the respective UI pages or REST APIs. While entering these email addresses, the format of the email address should be validated.

You can use Groovy scripts to specify the rules to validate email address and phone number formats.

For more information on Groovy scripting, see [Oracle Applications Cloud Groovy Scripting Reference](#) guide. For more information about REST APIs, see the [REST API for CX Sales and Fusion Service](#) guide.

The following code is a sample for validating email addresses and phone numbers:

```
def tCPhone = Phone;
tCPhone?.reset();
def noPhone = true;
println("Phone1" + tCPhone);
def RawPhNumber;
def PhNumber;
def emailaddr

while( tCPhone.hasNext())
{
    def tCphoneRecord = tCPhone?.next();
```

```
println('Phone' + tCphoneRecord );
PhNumber = tCphoneRecord?.PhoneNumber;
println('PhoneNum' + PhNumber );
RawPhNumber = tCphoneRecord?.RawPhoneNumber;
// println('RawPhoneNum' + RawPhNumber );
if((PhNumber != null || RawPhNumber != null) && tCphoneRecord?.Status == 'A') {
  noPhone = false;
  break;
}
}

def noEmail = true;
def emailiter = Email;
emailiter.reset();
def val = PrimaryEmailAddress
println("PrimaryEmail"+ val);
while(emailiter.hasNext())
{
  def emailrow = emailiter.next();
  //println('email' + emailiter);
  emailaddr = emailrow?.EmailAddress
  if(emailaddr != null){
    noEmail = false;
    break;
  }
}

if(noPhone && noEmail){

  throw new oracle.jbo.ValidationException('Phone number or Email required' + RawPhNumber + ': ' + PhNumber +
  ': ' + emailaddr);
}
return true;
```

How can I create a sales account owner?

You can create a sales account owner 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:

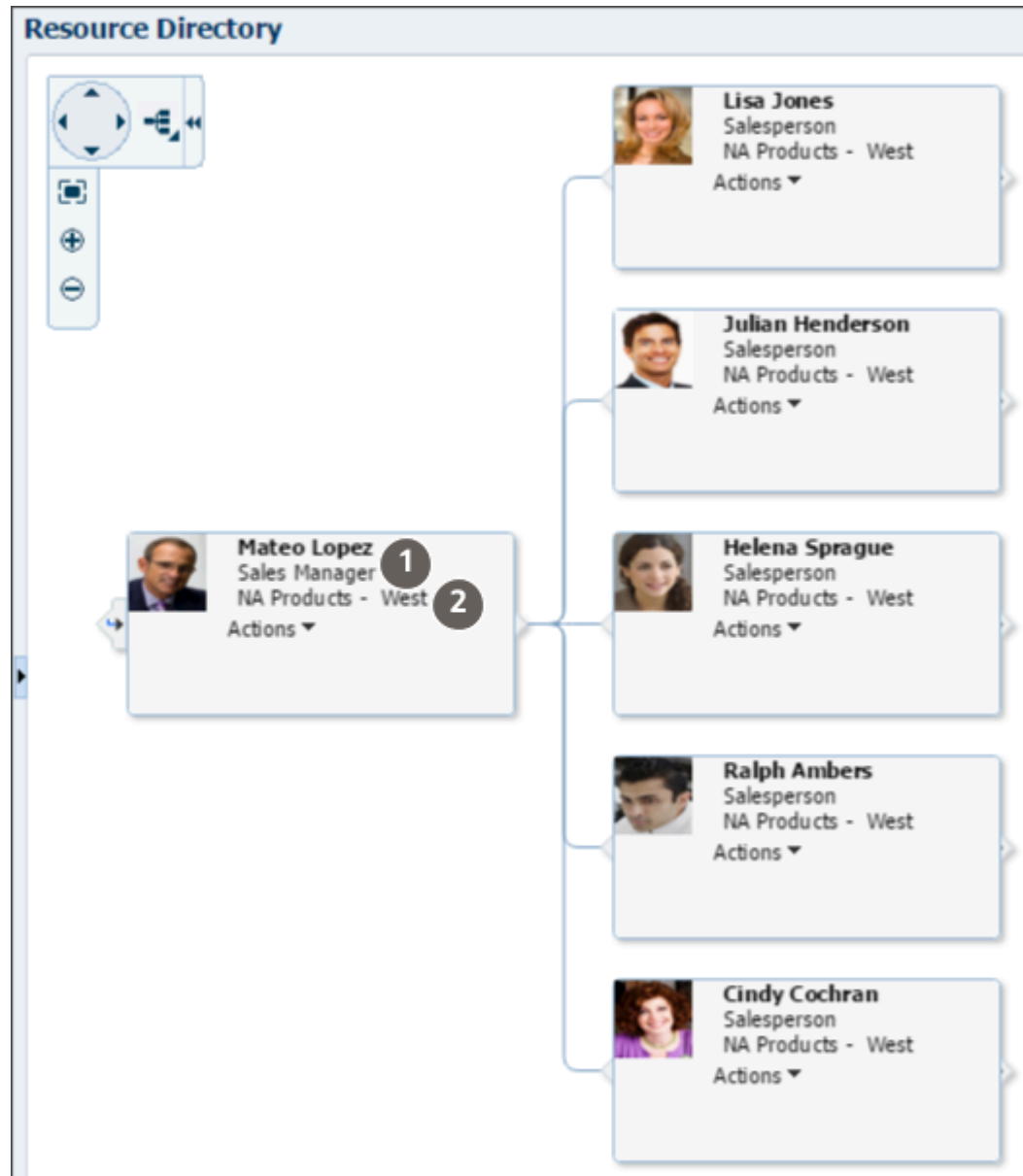
- A resource role (highlighted by callout 1)

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 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.

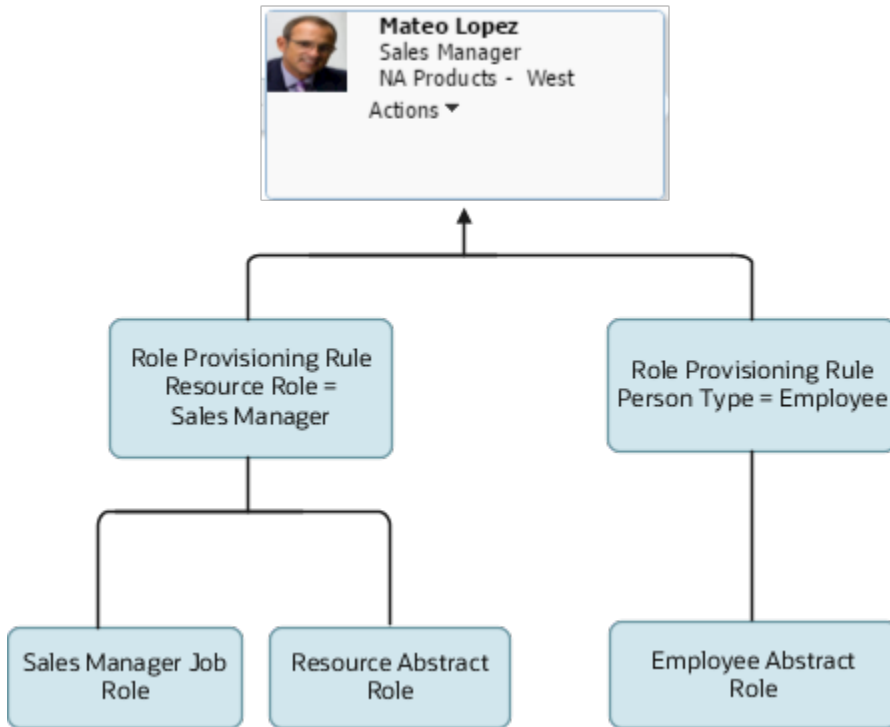
Provisioning Rule Name	Condition	Job or Abstract Roles Provisioned	UI Access
Channel Account Manager	HR Assignment Status is Active Resource Role is Channel Account Manager	Channel Account Manager Resource	CX Sales UIs
Channel Sales Manager	HR Assignment Status is Active Resource Role is Channel Sales 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 do I change user resource roles when job assignments change?

When job assignments change, you can update the resource role assigned to the employee. Updating a resource role involves these steps:

- Assigning the user a new resource role that corresponds to the new job assignment, for example, Sales Manager.
- Setting an end date for the old resource role, for example, Salesperson.

If the employee's new role also involves a change in the user's resource organization, for example, if the user is promoted to a management role from a non-management role, you must also change the user's organization membership.

You can make changes to role assignments using either the resource import management functionality or using the Sales UI. Although importing changes takes care of many tasks that you have to perform manually in the UI, if you're updating resource role information for an individual user, then using the UI can be more efficient.

These steps describe how to update role information in the UI for a user who's promoted from a sales representative role to a sales manager role.

1. Sign in to the application as the sales administrator or as a setup user.
2. Select **Navigator** > **My Team** > **Users and Roles** to open the Search Person page.
3. Search for and select the user who's being promoted. The Edit User page for the user opens.
4. In the Resource Information region, do the following:
 - a. In the **Resource Role** field, add the new resource role for the user, for example, **Sales Manager**.
 - b. In the **Reporting Manager** field, update the user's manager.
 - c. In the **Organization** field, specify the user's resource organization.

You must create a resource organization for every manager in your Sales organization. If you haven't created a resource organization for the new manager, then you can create one by clicking the **Create** link

from the end of the Organization list. The **Create Organization** dialog box is displayed allowing you to enter a new organization name.

- d. To automatically provision any roles provided by the new resource role you just assigned the user, click the **Autoprovision Roles** button in the Resource Information section.
- e. Click **Save and Close**.

5. Set an end date for the user's old resource role using these steps:

- a. From the Navigator menu, select **Directory > Resource Directory**.
- b. In the Tasks area of the Resource Directory page, select **View Resources**.
- c. On the View Resources page, search for and select the user.

The Resource page for the user opens.

Note that the user is assigned the new resource organization you previously created.

- d. Click the Roles tab, and in the Roles list, select the current role assigned to the user, for example, Salesperson, and enter an end date in the **To Date** field.

The value you enter is the date the user's assignment in the current role ends.

- e. Click **Save and Close**.

Note: When you promote a user from one management position to another, for example, from a Sales Manager role to a Sales VP role, then the resource hierarchy is maintained provided that the promoted user's resource organization doesn't change. So any users who reported to the Sales Manager continue to report to the same individual when that individual is promoted to the Sales VP role. If the promoted user's resource organization does change upon the promotion, the user's reports must be reassigned to a new manager.

For information about changing role assignments using the resource import management functionality, see the topic about importing resource data in the Understanding Import and Export Management for Sales and Fusion Service guide.

Related Topics

- [How do I import resource data?](#)
- [How do I make an employee a sales resource?](#)

How do I create application users?

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, but you can't create resources in the Security Console.

This topic describes how to create individual sales users in the Manage Users task UI. If you have a large number of sales users to create, then importing users is useful. For additional information, see the chapter about importing sales users in the Implementing Sales guide or the chapter about importing resource data in the guide Understanding Import and Export Management for Sales and Fusion Service.

Before creating application users, make sure you have completed these tasks:

- Set up any additional resource roles or role provisioning rules that are required.

- Created a resource organization for each manager. If you don't create the resource organization ahead of time, then you must do so while creating each manager user.

Each manager is assigned with his or her own resource organization. Individual contributors automatically inherit their manager's resource organization. The application determines who's a manager from the resource role you assign to the user.

When you create application users, you automatically set up the reporting hierarchy of your organization by indicating each person's manager. For this reason, first create the user at the top of the hierarchy and that user's organization. You don't enter a manager for this user. You can then create the rest of the users starting directly under the top of the hierarchy and working your way down.

Steps to Create an Application User

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.
- Individual contributors automatically inherit their managers' resource organization.

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

1. Select **Navigator > My Team > Users and Roles** to open the Search Person page.
2. In the Search Results section, click the **Create** icon.

The Create User page opens.

3. In the Personal Details region, enter the user's name and a unique email address. The application sends user notifications to this email address by default unless you disable notifications in the Security Console.

Note: After you create the user, if you want to change the email address you can do so on the Users tab of the Security Console or using file import. You can't change email addresses on the Edit User page of the Manage Users work area.

4. The application prefills 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, 2015 to June 30, 2016, then you must enter a hire date of 7-1-2015 or earlier. You can't change the hire date after you create the user.
5. In the User Details region, you can either create a new account or link an existing, standalone user account to the new person record you're creating.
 - When creating Sales users, create a new account. To create a new account, select the **Enter user name** option and then enter a user name. If you leave the User Name field blank, then the user name is generated automatically using the enterprise default format. Unless you specify otherwise, email address is the default user name format.
 - Alternatively, if you want to link the new person record you're creating to an existing standalone user account, select the **Link user account** option, then search for and select the user account in the **Link User Account** dialog box.

6. In the User Notification Preferences region, select the **Send user name and password** option if you want a notification to be sent to the user when you save the user record and the user account is created. The notification includes a URL users can use to reset their password and sign in.

The **Send user name and password** option is enabled only if notifications are enabled on the Security Console and an appropriate notification template exists. For example, if the predefined notification template **New**

Account Template is enabled, then a notification is sent to the new user when you select the **Send user name and password** option.

If you deselect the **Send user name and password** option, a notification isn't sent when the account is created but you can choose to send the email later by running the Send User Name and Password E-Mail Notifications process. The process sends notifications to any users for whom you haven't so far requested an email. An appropriate notification template must be enabled at that time. Alternatively, you can use the Security Console to reset the password and send the notification.

7. In the Employment Information region, enter the values shown in the following table.

Field	Entry
Person Type	Select Employee.
Legal Employer	Select the legal employer Oracle created using the information you provided when you signed up with the cloud service.
Business Unit	Select the business unit for the user. Oracle creates an initial business unit using the information you provided when you signed up.

You don't have to complete the remaining fields in the Employment Information region.

8. In the Resource Information region, enter the following values.

Field	Entry
Resource Role	Select the role the user plays in the resource organization.
Reporting Manager	Select the user's manager. If you're creating the top user in your hierarchy, such as the CEO, you can leave this field blank.
Organization	If the user you're creating is a manager, and if you already created a resource organization for this manager, then select the appropriate resource organization. If you haven't created a resource organization for the manager, then you can create one by clicking the Create link from the end of the Organization list. The Create Organization dialog box is displayed allowing you to enter a new organization name. If the user you're creating isn't a manager, then the resource organization is automatically copied from the manager.

9. 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**.

The application provisions roles according to the provisioning rules specified for the selected resource role. Each sales user must have both the Employee and the Resource abstract roles in addition to the job roles they require.

10. You can also provision a role manually to the user if required by clicking **Add Role**. The **Add Role** dialog box opens.

11. Search for and select the role. The role is added to the Role Requests table with the status **Add Requested**.

Note: Roles that you can provision to others must appear in a role mapping for which you satisfy the role-mapping conditions and where the **Requestable** option is selected for the role.

12. Click **Save and Close**.

The application creates the user. If you selected the **Send user name and password** option, the application also sends the user the email with the URL the user can use to sign in to the application for the first time.

13. Click **Done**.

Related Topics

- [Create a Resource Organization](#)
- [Types of Sales Users](#)

How can my user view application data?

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

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

How do I manage Enterprise Data Quality matching configurations?

You can manage Enterprise Data Quality (EDQ) matching configurations using the Manage Enterprise Data Quality Matching Configurations setup task.

You can perform the following tasks as part of managing Enterprise Data Quality (EDQ) matching configurations.

- Copying a predefined Enterprise Data Quality matching configuration
- Editing a copy of the predefined Enterprise Data Quality matching configuration

Copy a Predefined Enterprise Data Quality Matching Configuration

To copy or make a duplicate of a predefined Enterprise Data Quality matching configuration, complete these steps:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Customer Data Management
 - o Functional Area: Data Quality Foundation
 - o Task: Manage Enterprise Data Quality Matching Configurations
2. On the Manage Enterprise Data Quality Matching Configurations page, select the **Account Duplicate Identification** match configuration, and click **Duplicate**.
3. Click **Yes** in the Warning dialog box.
4. Click **Save** to save the copy of the predefined configuration.
Note: You must save the copy of the predefined configuration, if you want to edit it.
5. Repeat Steps 2 to 4 to create copies of the predefined configuration for the Contact Duplicate Identification match configurations.

Edit a Copy of the Predefined Enterprise Data Quality Matching Configuration

To edit a copy of the predefined Enterprise Data Quality matching configuration, complete these steps:

Note: You can't edit the predefined Enterprise Data Quality configuration. You can only make a copy of it and edit it by following this procedure.

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Customer Data Management
 - o Functional Area: Data Quality Foundation
 - o Task: Manage Enterprise Data Quality Matching Configurations
2. On the Manage Enterprise Data Quality Matching Configurations page, select the copy of **Account Duplicate Identification** match configuration that you created in Copying a Predefined Enterprise Data Quality Matching Configuration section, and click **Edit**.
3. Select the **Active** check box to set the Account Duplicate Identification match configuration as the active configuration.
Note: By default, the predefined configurations are always set to active. If there are one or more copies of the predefined configurations, then you can set any of them to active by selecting the Active check box. At any given point in time, only one configuration can be active.
Note: Also, note that the Usage option is set to Both, which indicates that the configuration is for both real-time and batch matching.
Note: You must rebuild keys before activating a new or copied configuration. For more information about Rebuilding Keys, see the Key Generation topic.
4. Click **Yes** in the Warning dialog box to set this configuration as active.

5. In the **Match Attributes** section, perform the following steps:
 - a. Select a row to edit the mapping, and click the drop-down button for the selected row.
 - b. Select the relevant attribute from the list.
 - c. If the list doesn't display the attribute that you want for the mapping including published custom fields, then click **Search** to search for the attribute.

Note: To identify duplicates based on a custom field search the custom attribute in the Account attribute drop-down and then map it to any available unused EDQ attribute.
 - d. Select the relevant option and click **OK**.
6. Select a **Cluster Key Level** option. For example, select **Typical**.
7. In the **Score Threshold** field, enter a value between 0 and 100, such as **85**. In the **Match Results Display Limit** field, enter a value between 0 and 100, such as **20**.

Note: The Match Results Display Limit option isn't available for Batch.
8. Click **Save**.

Note: You can see the Automerge Threshold and Autolink Threshold values in the Batch tab. You can change these values in the Manage Customer Hub Profile Options page or override these values while creating the duplicate identification batch criteria rules.

Related Topics

- [How do identify duplicates using key generation?](#)
- [Enterprise Data Quality Matching Configurations](#)
- [Create Duplicate Identification Batches and Define Subset Rules](#)
- [Customer Hub Profile Options](#)
- [Automerge](#)

How can I enable a report to show amounts in the user-preferred currency?

You enable users to specify their preferred report currency when you select one of two user-preferred currency conversion methods in the Reports and Analytics catalog, under My Account Preferences. When you do, salespeople can specify the report currency in their General Preferences.

Your organization must implement multiple currencies for this to work, of course.

Note: Only Fact amounts are converted. Dimensional amount columns, such as budget amounts under the Opportunity folders, aren't converted.

Set the Currency Conversion Method for Reports and Analytics

1. Click **Navigator > Tools > Reports and Analytics**.
2. Click **Browse Catalog**.

3. Click **My Profile** and select **My Account**.
4. In the Preference tab, select one of the two conversion methods from the **Currency** list:
 - **User Preferred Currency using Simple Currency Management:** Converts the amount in the corporate currency to the currency you selected using the conversion rate valid at the time the record was last updated or saved. (this is the default setting)
 - **User Preferred Currency using Advanced Currency Management:** Converts the amounts from the currency in the transaction itself using the conversion rate on the date of your report.
5. Click **OK**.

How Users Specify Their Currency

Here's how salespeople specify the currency for their reports:

1. Navigate to **Tools, Set Preferences**.
2. Select **General Preferences > Regional**.
3. Select the preferred currency. Available currencies include those set up in your application.

How do I enable duplicate records for many to many relationships?

You can enable or disable duplicate records for many-to-many relationships using the `ORA_ZCX_MM_ALLOW_DUPLICATE_FEATURE` profile option.

To change the default values of these profile options:

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

How do I enable duplicate checking on CX Sales Mobile?

You can enable duplicate checking for CX Sales Mobile in Application Composer Mobile Application setup.

Before you start, make sure that you've enabled duplicate checking in the Sales application itself. See the topic [How do I enable duplicate checking for accounts and contacts?](#)

Steps to Enable

1. Create and enter a publishable sandbox where Application Composer is enabled.
2. Navigate to **Application Composer > Mobile Application Setup > CX Sales Mobile Composer > Settings**
3. In the list of settings, expand **Check for Duplicates**.
4. Flip on the **Enable for Accounts** switch to enable account duplicate checking.
5. Flip on the **Enable for Contacts** switch to enable contact duplicate checking.
6. Click **Save** in the upper right-hand corner of the screen.

7. Validate that the duplicate checking works in CX Sales Mobile.
8. Publish the sandbox.

How the Duplicate Checking Works

The duplicate checking identifies potential duplicates when salespeople create accounts and contacts. The salesperson can either decide to accept the existing record or create a new one. The duplicate check is done synchronously. After tapping **Save** on the create page, the user must wait for the duplicate check to complete before progressing to the next step.

If there are more than 5 potential matches for a new account or contact, the 5 highest scoring potential matches are displayed to the user as determined by scoring criteria established in Enterprise Data Quality Matching Configurations.

How can I hide a smart action from the Actions menu in Workspace objects?

Use the Smart Actions page in Application Composer to disable or enable an action. Smart actions are contextual actions that are mapped to an object and client application, such as Workspace.

Smart actions make tasks that are used often easily accessible because they're always available from the same place on a page, such as from the Workspace list page or in the Action Bar. Here's how to remove a smart action so that users won't see it:

1. In Application Composer, click **Smart Actions**, available in the Common Setup.
2. Find the action you want to disable and select **No** in the **Enabled** column.

What privilege do I need to view partner information for my Opportunity?

If you're assigned a custom role, then you must be granted the Manage Opportunity Partners (MOO_MANAGE_OPPORTUNITY_PARTNERS_PRIV) privilege to view partner information when editing an opportunity.

For example, the Sales Channel and Primary Partner fields and the Partners subtab are only visible to users who have a job role that includes this privilege.

Note: If an administrator used Application Composer to remove the Primary Partner Field from the Edit Opportunity layout, then you won't see the Partners tab or the Primary Partner field if your job role includes the Manage Opportunity Partners privilege.

Can I change and replace words or phrases that appear on pages and other areas of the UI?

Yes, you can use the User Interface Text tool to change text that appears on application pages. For example, you can change field names, page titles, help text (not links) that appear in help windows or menu labels on the Navigator and home pages and so on.

Note: To use the User Interface Text tool, make sure you've the Manage User Interface Text (FND_MANAGE_USER_INTERFACE_TEXT_PRIV) privilege.

You can also use this tool to change or translate multiple strings at the same time and you can export your strings to make your changes offline. See [Modify Text Using User Interface Text Tool](#) for more about the User Interface Text tool.

How do I convert leads to accounts in CX Sales?

If your business uses net new leads where account values are entered manually using free-form text fields, then you can make the New Account field available on the Leads UI through Application Composer. This field is hidden by default, so to use it for your new leads, you must manually expose this field.

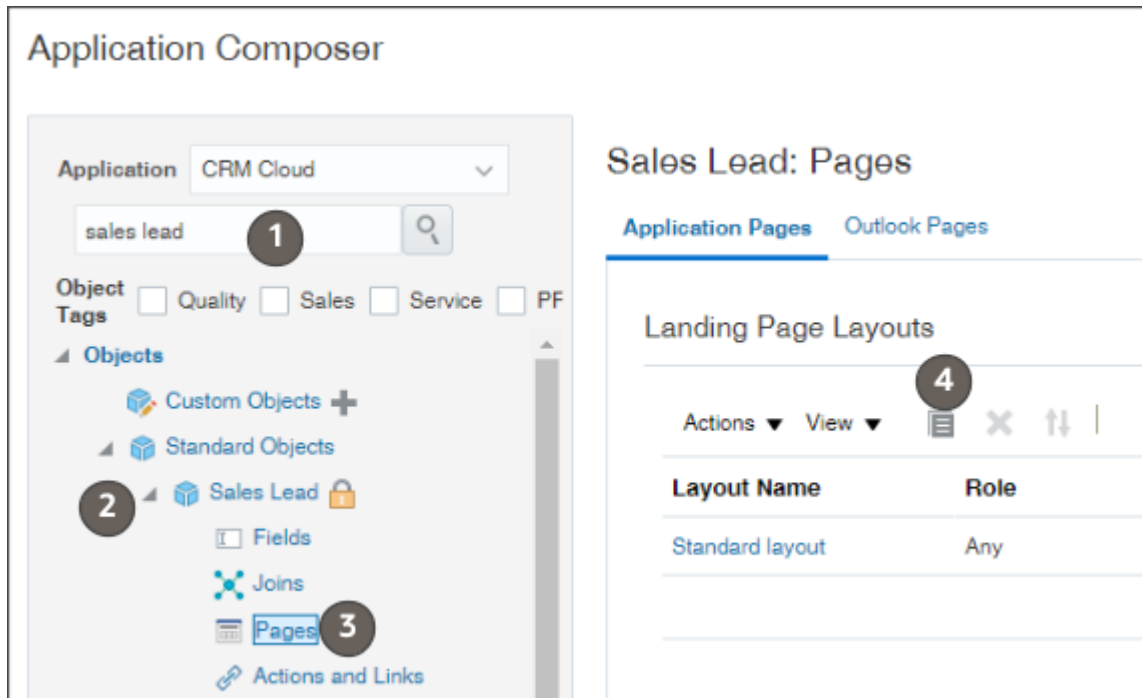
If the new lead that you enter gets converted to an opportunity, the details become available as existing account information. To have a new account created as part of the lead conversion into an opportunity, you must set up the following:

1. Expose the New Account field on the Leads page as described in the **Add the New Account Field to the CX Sales Lead UIs** section:
 - a. Create and activate a sandbox.
 - b. Create custom layouts for the appropriate pages and add the field as required.
 - c. Review your work in the leads pages.
 - d. Publish the sandbox.
2. Enable the default setting for the creation of an account, a contact, both an account and a contact, or none during lead conversion by setting the profile option **Create Account and Contact from Lead** (ORA_MKL_LEAD_ACT_CON_CREATE). The default value is Both, to but you can enter Account to suit your requirements.
3. Create the Copy Map for Lead to Account file to capture the data that needs to be transferred at conversion time. This file maps objects and attributes during the creation of an account, when converting a lead to an opportunity. See the **Copy a Lead to Account Map** section for more information.
4. Set the Lead to Account Mapping (MKL_LEAD_TO_ACCOUNT_MAPPING_NAME) profile option value from the default Standard Copy Lead To Account Map value with the exact name of the mapping file name created in Copy Maps as created in the previous step.

Add the New Account Field to the CX Sales Lead UIs

You must add the New Account field to the leads pages that salespeople use to create and qualify net new leads.

1. In the Navigator, click **Configuration > Application Composer**.
2. In Application Composer, 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 field, do the following:
 - a. Find 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. In the **Available Fields** column, find the **New Account** field 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.

Copy a Lead to Account Map

Copy maps enable you to create objects by copying existing objects. For example, you can use predefined mapping files to copy lead attributes stored on a lead to the account created during lead conversion.

Here's how to copy a lead to an account map:

1. Ensure that you're working in an active sandbox.
2. Click **Navigator > Configuration > Application Composer**.
3. Select **Sales** to filter the object search, and in **Advanced Setup**, select **Copy Maps**.
4. On the Copy Maps page, select the **Copy Lead to Account > Standard Copy Lead to Account Map**.
5. Create a copy of the map and enter relevant account mappings on the Edit Copy Map page.
6. Click **Save and Close**.
7. Specify the mapping file name in the following profile option:
 - Use the **Lead to Account Mapping** (MKL_LEAD_TO_ACCOUNT_MAPPING_NAME) profile option to specify the mapping file name created in Copy Maps. This file maps objects and attributes during the creation of an account when converting a lead to an opportunity.

How can I download CX Sales Mobile if I can't access Google Play Store?

Users in countries where you can't access the Google Play Store can download the latest version of Oracle CX Sales Mobile from Oracle using this link: <https://www.oracle.com/downloads/cloud/oracle-cx-sales-mobile-downloads.html>

You can distribute the app to your users through any MDM or EMM service, or you can make the app available on your internal secure portals. The app version made available on this site is the same as the one on the Google Play Store.

How do I change the first or last name of a user?

You can change the name of a user by editing their profile in Users and Roles. Here's how:

1. In the **Navigator** open **My Team > Users and Roles**.
2. In the Search Person window, search for the name using the **Keywords** field.
3. Click the name link to edit the user.
4. Change the name.
5. Click **Save and Close**.

How do I resolve account search errors in Workspace?

Sometimes you might receive an error that Workspace can't retrieve records for the object you're searching for, or you might see some records in your search results list that you can't drill down for more details. If this happens, it's more than likely the record indexing hasn't fully completed, or you might need to run a full Publish indexing process from the Monitor UI tab of the Configure Adaptive Search page.

While records you create and update in the UI are automatically indexed and made searchable within seconds, imported records or records updated by background processes aren't available for search until the process completes.

You must click Publish to run the indexing process each time you:

- Make changes on the Setup tab
- Perform a production to test (P2T) environment refresh
- Receive errors when searching or trying to retrieve records in Workspace

Can I set a standard object field as required using a custom layout?

No. Standard objects such as Leads, Opportunities, Competitors, and so on already have their associated field properties set, such as default, required, updatable, and read-only. Hence, a field for standard objects can't be set as required if using a custom layout.

You can use Page Composer to display a field with the required symbol (*) but it won't act as a functional required field. The required * symbol will be visible on the field and will allow manual data entry but without any functional implications.

Related Topics

- [Providing an Expression to Make a Custom Field Conditionally Required](#)
- [Set the Required Field Property](#)

How do I enable team-based access to custom objects when using access groups?

You can provide team resources with access to custom object data, where access is based on the resource's membership in a team, also known as team-based access group security. With this type of security, team members and their management hierarchy can access custom object records.

To enable team-based security for custom objects:

1. Create a relationship between your custom object and the Resource object.
In Application Composer, create a many-to-many relationship between your custom object and the Resource object, where your custom object is the source object.
2. Create a subtab so that your users can add resources to custom object records at runtime.
Add a Team subtab to the custom object details page layout, where the Team subtab is based on the intersection object created from your many-to-many relationship.
3. Configure security so that the team member on the custom object record and their management hierarchy have access to the record.
To do this, set security for both the intersection object and the custom object.
For the intersection object:

- a. Navigate to the Security node for the intersection object.
- b. On the Define Policies page, select each role that needs access and, for each column (Read, Update, Delete), select **All**.

For the custom object:

- a. Navigate to the Security node for the custom object.
 - b. On the Define Policies page, select the Enable Access Group Security check box.
 - c. Select the Configure Team for Access Group Security check box and select the many-to-many relationship that you just created.
4. Configure functional security for the required roles.

This step isn't related to access group security (data security), but it's a required step so that the right roles can access the custom object's user interface pages at the appropriate level (functional security).

Note: The Enterprise Scheduler Administration role needs to be added in custom object functional security for access group security to work.

- a. Navigate to the Security node for the custom object.
- b. On the Define Policies page, select each role that needs access and, for each column (Read, Update, Delete), select the access level for reading, updating, and deleting records: **Functional Read**, **Functional Delete**, or **Functional Update**.

5. Publish your sandbox.

Finally, enable your custom object for access group object sharing rules. You do the next set of steps in the Sales and Service Access Management work area.

1. Navigate to Access Groups in the Sales and Service Access Management work area.
2. On the Object Sharing Rules page, select the **Synchronize Custom Objects and Fields** item from the **Actions** menu.

After you sync, your custom object displays in the Object list.

3. Select your custom object from the Object list to configure object sharing rules.

In the Rules region, the (Custom Object) Team and (Custom Object) Team Hierarchy predefined rules display, in addition to the rules for (Custom Object) Owner and (Custom Object) Owner Hierarchy.

4. Click each rule to assign a custom access group and access level.

Note that access groups are automatically created based on roles created using the Security Console.

For more information, see the Access Groups chapter in the Oracle Fusion Cloud Customer Experience Securing Sales and Fusion Service guide:

5. On the Access Groups Monitor page, optionally schedule and run the Perform Object Sharing Rule Assignment process to assign access group object sharing rules to your custom object.

By default, the process runs automatically at scheduled intervals to make sure you have the required access to all object data for your selected access groups. But you can submit the process manually if, for example, you want immediate access to new records and objects.

Related Topics

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

How do I import hierarchy data?

You can use the import management to create Hierarchy data.

The hierarchies supported are:

- Customer hierarchy
- Dun and Bradstreet hierarchy
- Trading Community Party hierarchy

To import Hierarchy records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .CSV file for a successful import.

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.

The preferred option to uniquely identifying an object record is the Internal ID. If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier. Attributes with "ID" in the attribute name are typically internal IDs. Use this option only if you're updating Hierarchies. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Hierarchy object, the attributes are TreeStructureCode, TreeCode, TreeName, and TreeVersionName.

Required Attributes and Validations for Hierarchy Object

To import data successfully into Oracle Applications Cloud, your .CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new Hierarchy records, prerequisite setup tasks for the attributes, and specific validations, if any, for Hierarchy import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Hierarchy Record
TreeStructureCode	Unique identifier for a tree structure.	Varchar2	30	Seeded data needs to be present.	Required
TreeCode	User defined Identifier for the tree code.	Varchar2	30	No validation	Required
TreeName	Name of the tree	Varchar2	80	No validation	Required
TreeVersionName	Version Name of the tree	Varchar2	80	No validation	Required
LangCode	Indicates the code of the language into which the contents of the translatable columns are translated.	Varchar2	4	No validation	Required
AsofDate	The date that's used to determine the tree version when you're updating a tree version.	Date		No validation	Optional

You can view the Hierarchy object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Note: You can find TreeStructureCode values from the lookup type PARTY_HIERARCHY_TYPE. FND_TREE_NODE table holds the nodes of trees. Navigate to **Setup and Maintenance > Search Task > Manage Standard Lookups** and search lookup type as PARTY_HIERARCHY_TYPE.

Create the Source CSV File

The .CSV file is provided as input to the file-based data import process. You must populate the .CSV file with the data you want to import into Oracle Applications Cloud.

You can either create a CSV file on your own or use templates available in preexisting mappings. To download a template, do the following:

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

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

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

Create the Import Activity

To import data into Oracle Applications Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. In the Navigator, under **Tools**, click **Import Management**.
2. In the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Hierarchy** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. In the **Create Import Activity: Map Fields** page edit the attribute mappings if required, and click **Next**.

Note: Click **Validate Data** to validate the mapping of the source file for unmapped columns and to check for data format issues.

6. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Note: Initiate the Tree Flattening Service manually. Do one of the following:

- From the navigator, select **Scheduled Processes**. In the Schedule New Process dialog, search for **Party Hierarchy Generation** and click **OK**.
- From Setup and Maintenance, search and run the Trading Community Party Hierarchy Generation task.

Review the Import Results

You can review the import results by checking for the import activity in the **Manage Import Activity** page. A file import activity is said to be successful when its status displays as **Completed**. To check the status of the import activity, do as follows:

1. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, search for the import activity that you created using one of the search criteria, such as status, name, object, and so on.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. The other valid values for the import activity status are **Queued for import**, **Preparing data for import**, **Importing data**, **Completed with errors**, and **Unsuccessful**.

Note: On this page you can also quickly view the number and status of all active imports, completed imports, and unsuccessful imports that have been submitted.

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)

How can I create an analysis showing only the active sales territories in the Sales - CRM Territory Resource subject area?

By default, territory analyses include all territories, including those that are deleted or inactive. If you don't want to include inactive territories in your analysis, then you can filter them out using the Effective End Date attribute which is available in the Territory folder in the Sales - CRM Territory Resource subject area.

You've two ways of filtering out inactive sales territories in your analyses using Effective End Date :

- If you're creating an analysis using the wizard on the Reports and Analytics page, you can only filter out inactive territories by a specific date you enter: **Effective End Date** > <today's date>.
- On the Catalog page, by contrast, you can, instead of a specific date, enter the variable **CURRENT_DATE**, which filters out all inactive territories by the system date, the current date whenever you run the analysis.

Create the Analysis in the Wizard, filtering Out Inactive Territories by a Specific Date

1. On the home page, click **Navigator > Tools > Reports and Analytics**
2. On the Reports and Analytics page, click **Create > Analysis**.
3. In the Select Subject Area page, search and select the Sales - CRM Territory Resource subject area and create your analysis.
4. In the Sort and Filter step, click **Add Filter** and select the **Effective End Date** column (available in the Territory folder).
5. Select the **is greater than** operator and enter a date.

Filter

Indicates Incomplete Filter (not applied to report)

Show: Data Satisfying All Filters

Status	Column	Operator	Value	Action
	Effective End Date	is greater than	9/22/23	X

+ Add Filter

6. Complete creating the analysis.

Filter Out Inactive Territories by the System Date in the Catalog

1. On the home page, click **Navigator > Tools > Reports and Analytics**
2. On the Reports and Analytics page, click the **Browse Catalog** button.
3. Create or edit an analysis for the Sales - CRM Territory Resource subject area.
4. On the Criteria tab, click **Create a filter for the current subject area** icon (the filter icon).
5. Select the **Effective End Date** column (available in the Territory folder).
6. In the New Filter window, select the **Is greater than** operator.
7. Click the **Add More Options** button and select **SQL expression**.

Note: You can't use Session Variable selection here.

8. In the **SQL Expression** field, enter **CURRENT_DATE**. The

Edit Filter

Column: Effective End Date *fx*

Operator: is greater than

Value:

SQL Expression: CURRENT_DATE X

Add More Options Clear All

☐ Protect Filter

☐ Convert this filter to SQL

OK Cancel

9. Click **OK**.
10. Complete creating the analysis.

How do I specify the Industry Classification for accounts?

NAICS and SIC contain classification codes that represent major industries.

North American Industrial Classification System (NAICS) codes and Standard Industrial Classification (SIC) provide uniform classification system of industries. For example,

322 is the NAICS classification code for Paper Manufacturing and 3254 is the NAICS classification code for Pharmaceutical and Medicine Manufacturing.

Use the following procedure to specify which industry classification category you want to use for accounts.

The classifications for the category you select appear in the list of values for the Industry field in the Account user interface. By default, the profile is set to CUSTOMER_CATEGORY.

1. Sign in as a setup user.
2. In the Setup and Maintenance work area, go to the following:
 - Offering: Sales
 - Functional Area: Sales Foundation
 - Task: Manage Administrator Profile Values
3. On the Manage Administrator Profile Values page, search for the Profile Option Code MOT_INDUSTRY_CLASS_CATEGORY.
4. Select the classification category from the Profile Value list. The available values are:
 - 1972 SIC
 - 1977 SIC
 - 1987 SIC
 - CUSTOMER_CATEGORY
 - NACE
 - NAF
 - NAICS_1997
 - NAICS_2002
 - NAICS_2017
5. Click Save and Close.

What are Agreement Rules?

An agreement rule is a collection of patterns and conditions that are defined to determine whether a merge request should be vetoed by the application or not. Merge requests that violate these rules are either rejected or end in error.

Agreement rules let you check a merge request for any veto conditions that can prevent a merge from occurring. These rules save resources and time by obviating the need to review merge requests to prevent undesired merge from being processed. Besides, agreement rules prompt you to consider alternative duplicate resolution mechanism such as linking.

Agreement rule can be of the following two types:

- Predefined
- User-defined

Predefined Agreement Rules

These are agreement rules that are predefined in the application. You can only view the predefined agreement rules.

The following table describes the predefined agreement rules shipped with the application for Oracle Sales Cloud. Merge requests that violate these rules are automatically rejected.

Name	Description
HR_APPLICANT_VETO	Prevents a person party with an active party usage of HR_APPLICANT from merging with another party.
HR_EMPLOYEE_VETO	Prevents a person party with an active party usage of HR_EMPLOYEE from merging with another party.
HR_CONTINGENT_WORKER_VETO	Prevents a person party with an active party usage of HR_CONTINGENT_WORKER from merging with another party.
HR_PARTY_SITE_VETO	Prevents a party site with active original system reference from Oracle Fusion Human Capital Management system from merging with another party site.
RESOURCE_PERSON_VETO	Prevents a person party with an active party usage of RESOURCE from merging with another party.
BANK_VETO	Prevents an organization party with an active party usage of BANK from merging with another party.
CLEARINGHOUSE_VETO	Prevents an organization party with an active party usage of CLEARINGHOUSE from merging with another party.
BANK_BRANCH_VETO	Prevents an organization party with an active party usage of BANK_BRANCH from merging with another party.
BRANCH_CLEARINGHOUSE_VETO	Prevents an organization party with an active party usage of CLEARINGHOUSE_BRANCH from merging with another party.
LEGAL_EXTLEGAL_PARTYUSGRULE_VETO	Prevents an organization party with active party usage of LEGAL_ENTITY from merging with another organization party with active party usage of EXTERNAL_LEGAL_ENTITY .
IC_PARTICIPANT_PERSON_VETO	Prevents a person party with an active party usage of INCENTIVE_COMP_PARTICIPANT from merging with another party.

Name	Description
IC_PARTICIPANT_ORG_VETO	Prevents an organization party with an active party usage of INCENTIVE_COMP_PARTICIPANT from merging with another party.
PARTNER_VETO	Prevents an organization party with an active party usage of PARTNER from merging with another party.
INACTIVE_PARTNER_VETO	Prevents an organization party with an active party usage of INACTIVE_PARTNER from merging with another party.
CUST_CONTACT_DIFF_RESOURCE_ORG_VETO	Prevents two partner owned contacts belonging to different resource organizations from being merged.
CUST_CONTACT_INTERNAL_PARTNER_VETO	Prevents a partner owned contact that doesn't belong to a resource organization from merging with another partner owned contact that belongs to a resource organization.
CUST_CONTACT_INTERNAL_PARTNER_ORG_VETO	Prevents a contact owned by an internal user from merging with a contact owned by a partner user.
CARD_ISSUER_VETO	Prevents an organization party with an active party usage of CREDIT_CARD_PROVIDER from merging with another party.
LEGAL_ENTITY_VETO	Prevents an organization party with an active party usage of LEGAL_ENTITY from merging with another party.
ESTABLISHMENT_VETO	Prevents an organization party with an active party usage of ESTABLISHMENT from merging with another party.
HIERARCHY_CYCLE_PREVENTATION_VETO	Prevents merge from happening when the master party record is at a level lower than the nonmaster party record within the same active tree version.
NAMEDACCOUNT_UNNAMEDACCOUNT_VETO	Prevents merge from happening when the master party record isn't a named account whereas the nonmaster party record is a named account and these are in active hierarchies.

The following table describes the predefined agreement rules shipped with the application for other Fusion applications. Merge requests that violate these rules are automatically rejected.

Functional Area	Name	Description
Distributed Order Orchestration	DOOPartyMerge	Prevents the customer account and customer account sites from getting merged when an open Distributed Order Orchestration (DOO) order is associated with either of them.
Distributed Order Orchestration	POZSUPPLIER	Prevents the party merge process from being completed, when any of the following conditions are met:

Functional Area	Name	Description
		- The corresponding supplier isn't merged - Few purchase orders aren't transferred for the corresponding From Supplier - The merged-from party and merged-to party aren't correlated with the same merged-from supplier and merged-to supplier - The corresponding supplier site haven't been merged - Few purchase orders aren't transferred for the corresponding supplier site - The merged to party site doesn't have an associated supplier site - The merging contact parties aren't valid supplier contacts - The merging contact parties don't belong to same supplier
Tax	ZX_PARTY_MERGE	Prevents the party from merging when any of the following conditions are met: - The 'From Party Tax Profile type' is not the same as 'To Party Tax Profile type' - The 'From Party Tax Profile type' equal to 'THIRD PARTY' - The From party tax attributes (Registration Type code, Registration Number, Rule code, Self-assess flag, Inclusive tax flag) aren't same as the To party tax attributes (Registration Type code, Registration Number, Rule code, Self-assess flag, Inclusive tax flag)
Accounts Payable	AP_PARTYVETO	Prevents party merge in the unprocessed invoices or unprocessed payments.
Accounts Receivable	AR_FinArCustomersVeto	Prevents the customer merge when either of the following conditions are met: - The merging customer has any Balance Forward Bill (BFP) in draft mode in the application - The merging customer site has any BFB in draft mode in the receivables application
CSE Assets	CSE_SELLING_BUSINESS_UNIT_VETO	After the customer account site merge, CSE party merge will check if the new account site + the sold from business unit combination that we have in our cse_assets_b table is a valid combination using hz_cust_acct_sites_all. If not valid, we will veto the party merge.

Functional Area	Name	Description
Service	SVC_CSS_CONT_PENDING_REG_VETO	Validate that contacts can't be merged if the victim contact has a self-service registration record
	SVC_CSS_ACT_PENDING_REG_VETO	
	SVC_CSS_ACT_USERS_VETO	Don't allow account merge if the account has contacts with pending registrations Do not allow account merge if the account has active ODCS users
Grant/Award Management	GMS_SPONSOR_NOT_EXIST_VETO	The master party doesn't exist as a grants sponsor.
	GMS_TOSPON_NOTLOC_VETO	The sponsor LOC of the master and target party isn't same. Ensure the LOC is same for both sponsors. Either the LOC for both is enabled or both is disabled.

User-defined Agreement Rules

These are additional agreement rules that you can define to determine whether a merge request should be vetoed by the application. You can create, view, update, and delete user-defined agreement rules.

Note: The application doesn't support changing agreement rules inside the Application Composer sandbox. Therefore, the merge engine doesn't pickup the changes made to these rules inside the Application Composer sandbox.

How do I get financial customer records to appear as accounts in the Sales application?

You can make basic information from customer account records in Oracle Financials appear in the Sales application in multiple ways.

You can do any of the following:

- Enable duplicate checking in your Sales application.
- Run a process to make all Financials customer accounts available in Sales.
- Use the REST API to make individual Financials customer accounts available as Sales accounts.

Enable Duplicate Checking in Sales

When you enable duplicate checking in Sales, you make it possible for salespeople to view and select existing Financials customer accounts make basic information about individual Financials accounts visible in Sales.

Each time a salesperson creates an account record, the application checks both sales and financials records for potential duplicates. The application uses multiple matching criteria that you can configure, such as the organization name, the address, tax ID, and the D-U-N-S Number. If a potential match is found, the salesperson can either select the existing record or continue to create a new record. If the salesperson selects an existing record, and that record exists only in Financials, then the application automatically makes the record available in Sales.

For details on how to enable duplicate checking, see the topic [How do I enable duplicate checking for accounts and contacts?](#).

Run a Process

Run the process Synchronize Financials Cloud Accounts and Contacts with CX Sales to make all Financials customer accounts visible in sales. The process identifies those Financials accounts that don't include the required Sales Account information and automatically generates it making these accounts visible in both Sales and Financials.

1. Click **Navigator > Tools > Scheduled Processes**.
2. On the Overview page, click **Schedule New Process**.
3. In the Schedule New Process window, enter `Synchronize Financials Cloud Accounts and Contacts with CX sales` in the **Name** field and press **Return**.
4. Select the process and click **OK**.

Use the REST APIs

Use the web service: `https://{environment host}/crmService/SalesPartyService?WSDL`

Here's a sample payload. You can use it to create either an account of type Customer or type Prospect.

```
<typ:createSalesAccount>
<typ:salesAccount>
<sal:AccountDirectorId>9999999999999999</sal:AccountDirectorId>
<sal:PartyId>9999999999999999</sal:PartyId>
<sal:SalesAccountType>ZCA_CUSTOMER</sal:SalesAccountType>
<!--sal:SalesAccountType>ZCA_PROSPECT</sal:SalesAccountType-->
</typ:salesAccount>
</typ:createSalesAccount>
```

Related Topics

How do I enable duplicate checking for accounts and contacts?

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 Cloud, the application checks for potential duplicates in Financials as well as in Fusion Sales. 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 customer account record that isn't yet

available in Sales, the basic information 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 they try to create an account with possible duplicates.

Possible Duplicates Cancel

The following accounts appear to be similar to the one you entered.

	Name	Owner	Address	URL
☐	Brother Bagel	Bala Gupta	500 MAIN ST,DALLAS, TX 75202	Select

My New Account

Name	Owner	Address	URL
Brother's Bagels	Bala Gupta	500 MAIN ST,DALLAS, TX 75202	Continue with Create

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.

Enable the Server Used for Duplicate Matching

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

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

Manage Data Quality Server Configurations ?

Save Save and Close Cancel

Server Configurations

Actions ▾ View ▾ Detach

Name	Enabled
EDQ Realtime and Batch Basic Match Server	☒

▲ Server Parameter Values

Server Address fa-internal.oracleoutsourcing.com

Server Port 10003

3. Click **Save and Close**.

Activate the Existing Duplicate Matching Configurations

1. In Setup and Maintenance, go to the following:
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o 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 (**Navigators > 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).

1

2

Active ☐

Match Identifier	Contact Attribute
middleName	AdditionalPartyName.PersonMiddleName
lastName	AdditionalPartyName.PersonLastName
firstName	AdditionalPartyName.PersonFirstName
email	Email.EmailAddress
city	Address.City

- 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 only. Setting this profile option to TRUE is optional because the data quality checking configuration uses multiple attributes, including the organization 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**.

Related Topics

- [How do I enable duplicate checking on CX Sales Mobile?](#)

Can I disable the Evaluate Agreement Rules profile option?

The Evaluate Agreement Rules (ORA_ZCH_AGREEMENT_EVALUATION) profile option controls whether agreement rules are adhered to during merge processing.

Setting this option to N disables agreement rule checking. We recommend that you don't disable agreement rules.

Note: Disabling agreement rules can lead to orphan data and may cause issues for different application flows. We recommend that you don't disable it.

You can add a new profile value row and specify h or N.

You can set the profile option value only at the site level using the predefined profile option definitions.

The following table lists the Customer Hub profile options that you can configure in the Setup and Maintenance work area using the following:

- Offering: Customer Data Management
- Functional Area: Customer Hub
- Task: Manage Customer Hub Profile Options

How do I refresh denormalized data for account hierarchy?

Use the Refresh Denormalized Data for Account Hierarchy scheduled process to refresh the denormalized data for the account hierarchy.

This scheduled process is used to update and organize the information about accounts

When to Use

This schedule process:

- This scheduled process impacts hierarchy data.
- You won't be able to get the hierarchy data if you don't run this scheduled process. The denormalized table will be blank.

Privileges Required

Verify that you have the following privilege:

- HZ_RUN_TRADING_COMMUNITY_ACCOUNT_HIERARCHY_CHANGE_IDENTIFICATION_PRIV

Verify that you have the following roles:

- Sales Admin

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
 - On regular intervals depending on how frequently the hierarchy data is getting changed or manipulated.
 - The frequency of recurrence depends on how often the account hierarchies are changed. The recommended frequency is one hour. We recommend that don't change the default value of the Full Refresh parameter and leave it as No.

Note: After the scheduled process finishes running, enable the Account Hierarchy under Account object in Application Composer, ensure that you select the Include in Object Reference option, and publish the changes.

- If you want any hierarchy changes to be reflected immediately, run this scheduled process as an ad-hoc request without changing the Full Refresh parameter default value leaving it as No. Also, submit the Incremental Refresh in Adaptive Search on the account object.
- After an upgrade, a full refresh should only be performed once. Rerun requests should only be made when data has been added to or deleted from the hierarchy. Depending on how frequently the hierarchy is altered, you must schedule this job and choose the frequency. This scheduled process does a full refresh for the first time. In the subsequent runs, it syncs only impacted hierarchies.
- If you want to do a full refresh of the Account Hierarchy denormalized data, you must run this scheduled process with the Full Refresh parameter set to Yes. Also, submit a full Adaptive Search refresh on the account object.
- Compatibility:
 - This scheduled process is self-incompatible. If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.

Parameters

You might need to specify some of the following parameters:

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Full Refresh	Mandatory Default value: No	After an upgrade, a full refresh should only be performed once. Rerun requests should only be made when data has been added to or deleted from the hierarchy. Depending on how frequently the hierarchy is altered, you must schedule this job and choose the frequency. A job will behave as a Full Refresh if it is run in this mode for the first time; otherwise, the job will sync only impacted nodes.	No	Under Advanced Options, you need to expose a parameter for Full Refresh under Parameters tab which is by default selected as "No"	N/A

Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Check the log or output file.
- If the scheduled process didn't run successfully, you can re-submit the process after rectifying the error.
- This scheduled process is idempotent, which means, this scheduled process can be restarted if it failed in the initial run. No cleanup is required.
- You can create a notification schedule. To do this: Click **Advanced Options** and go to the **Notification** tab on the **Process Details** page.

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 information 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 they try to create an account with possible duplicates.

Possible Duplicates Cancel

The following accounts appear to be similar to the one you entered.

	Name	Owner	Address	URL
☐	Brother Bagel	Bala Gupta	500 MAIN ST, DALLAS, TX 75202	Select

My New Account

Name	Owner	Address	URL
Brother's Bagels	Bala Gupta	500 MAIN ST, DALLAS, TX 75202	Continue with Create

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:

- o Offering: Sales
- o Functional Area: Sales Foundation
- o Task: Manage Server Configurations

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

Manage Data Quality Server Configurations ?

Save Save and Close Cancel

Server Configurations

Actions ▾ View ▾ Detach

Name	Enabled
EDQ Realtime and Batch Basic Match Server	☒

▲ Server Parameter Values

Server Address fa-internal.oracleoutsourcing.com

Server Port 10003

3. Click **Save and Close**.

Activate the Existing Duplicate Matching Configurations

1. In Setup and Maintenance, go to the following:
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o 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 (**Navigators > 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).

1

2

Active ☐

Match Identifier	Contact Attribute
middleName	AdditionalPartyName.PersonMiddleName
lastName	AdditionalPartyName.PersonLastName
firstName	AdditionalPartyName.PersonFirstName
email	Email.EmailAddress
city	Address.City

- 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 create a list of all prospect accounts and their contacts?

You can create a list of all your prospects and their contacts in the Reports and Analytics work area using the Sales - CRM Customers and Contacts Real Time subject area.

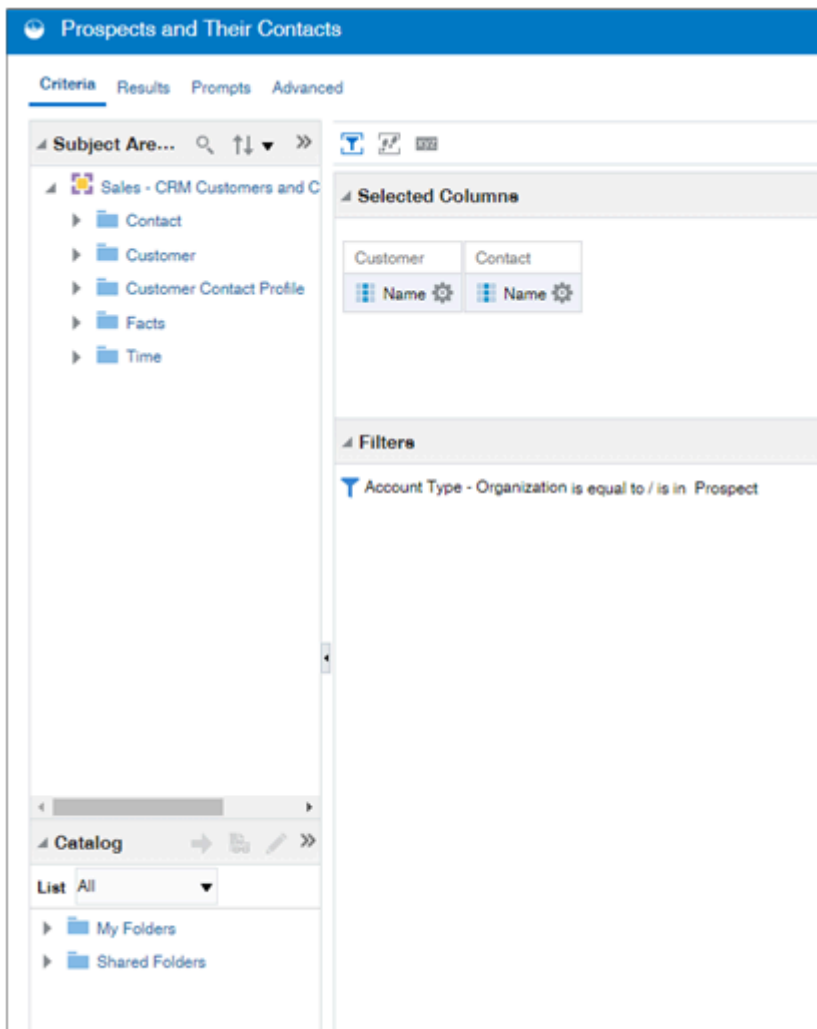
To create a list of all accounts, select the Name attributes from the Customer and Contact folders. To filter out just the prospect accounts, open the Customer folder, and add the filter: **Account Type - Organization** is equal to **Prospect**.

Here are the steps to create the analysis using the wizard:

1. Open the **Reports and Analytics** work area. (**Navigator > Tools > Reports and Analytics**).
2. Click **Create > Analysis**.
3. Search for and select the **Sales - CRM Customers and Contacts Real Time** subject area.
4. Click **Next**.
The Create Analysis wizard appears.
5. In the **Select Columns** step, **Subject Areas** pane, expand the **Sales - CRM Customers and Contacts Real Time** subject area.

6. Expand the **Customer** folder.
7. Scroll down to find the **Name** attribute and move it to the **Selected Columns** list.
8. In the **Subject Areas** pane, expand the **Contact** folder.
9. Scroll down to find the **Name** attribute and move it to the **Selected Columns** list.
10. Click **Next**.
11. In the **Select Views** step (Step 2), enter a name for your analysis, for example: **List of Prospects and Their Contacts**.
12. In the **Table** list, select **Table (recommended)** to display your list as table.
13. Select the **Preview** option.
The table of your accounts and contacts appears.
14. On the list of the Wizard steps, click the **Sort and Select** step (Step 5).
15. Click **Add Filter** > **More Columns** on the left-hand side.
16. Open the **Customer** folder and select **Account Type - Organization**.
17. Click **OK**.
18. In the filter **Operator** field, select **is equal to / is in**.
19. In the **Value** field, enter **Prospect** (exact capitalization is important).
20. Click **Submit**.
21. Enter a name for the analysis and select the folder where you want to save it in the catalog.

Here's a screenshot showing the analysis criteria as they appear in the catalog.



Can I create a custom field on the Partner Contact object?

The Partner Contact object is not yet extensible in Application Composer. Until the object is extensible, you can't create custom fields, such as dynamic choice list fields, for the object.

How do I customize the MDF Request approval flow?

The Marketing Development Fund feature (MDF) is optimized for partner users. You can optimize the user experience for channel managers by modifying the relevant fields and pages for the needed roles. Since brand owners don't have identical approval processes, MDF provides a flexible and quick way to create pre-approval validations that meet your specific business needs. If your business processes change, you can change your validations accordingly.

Activity management pages are optimized for direct sales. You must modify the activities pages to expose MDF attributes for customers offering MDF programs to their partners.

You must make the appropriate decisions during implementation for the following features that drive MDF request and MDF claim approvals:

- Approval routing rules
- Approval process flows

MDF Requests and MDF Claims Approval Routing Rules

MDF requests and MDF claims submitted by partners must be assigned to appropriate personnel in your organization so they can get access to MDF requests or claims based on their roles. For example, people who are approvers must be assigned properly so they can view, approve, reject, or return an MDF request or an MDF claim.

By default, commonly needed approval routing rules for MDF requests and MDF claims are provided. However, you can create your own approval workflow to route MDF requests and MDF claims to the correct approvers.

MDF Request and MDF Claim Approval Process Flows

The default MDF approval processes should meet most MDF request and MDF claim use cases. However, if you need to modify one or both flows, you can do so by editing the included human task flows, using the existing business flows as your templates. The templates are: **FundRequestApprovalHumanTask** for MDF requests and **ClaimApprovalHumanTask** for MDF claims.

Use these steps to edit the existing business flow templates in the Worklist application.

1. Sign in with your sales administrator credentials.
2. Click the Notification bell icon in the global header.
3. Click More Details, and then click Customer Relationship Management.
4. From the user_name drop-down list, select Administration - **Task Configuration**.
5. Perform the following steps as needed:

- a. For MDF Requests
 - i. Search for Fund% in the search field in the left panel.
 - ii. Click the Edit icon in the left panel.
 - iii. In the Assignees tab, and click inside the MDF Request Stage One Approvers box.
 - iv. Click the FundRequestApproval business rule.
 - v. Make the changes you need to fit your business needs.
 - b. For MDF Claims
 - i. Search for Claim% in the search field in the left panel.
 - ii. Click the Edit icon in the left panel.
 - iii. In the Assignees tab, and click inside the MDF Claim Stage One Approvers box.
 - iv. Click the ClaimRequestApproval business rule.
 - v. Make the changes you need to fit your business needs.
6. Save your changes.

Change the Number of Stages in an Approval Flow

MDF offers up to five approval stages, with both serial and parallel approvals on each stage for both MDF requests and MDF claims. If you need to add additional approval stages to the MDF request or MDF claim flow, follow these steps:

1. Click the MDF Request or MDF Claim Approval Stage Three box.
2. Deselect the Ignore Participants check box.
3. Click Advanced.
4. Deselect the Ignore Stage check box.
5. Click MDF Request or MDF Claim Approval Stage Three Approvers.
6. Click Advanced.
7. Deselect the Ignore Participants check box.
8. Save your changes.

To remove stages, you can create rules that skip approval levels. For example, use these steps if you want to have one approval stage for MDF claims:

1. Create a new rule that skips stage one.
2. Move this rule so it's the first rule in the UI.
3. Inactivate the first seeded rule.

Example of Configuring MDF Pre-Approval Validation

Sales administrators can use Application Composer to create customer-defined validations that run before an approver takes action on a submitted MDF request or MDF claim. In this example, a sales administrator for a brand owner creates a validation that ensures MDF requests can only be approved if a budget is associated to the request. When this validation is activated, approvers receive an error message when they try to approve a MDF request that doesn't have an associated budget.

Each human task action requires a separate validation. After you create the validation in Application Composer, you must create a profile option whose value is the name of the object function that will be invoked when the human task action executes. You can configure validations for the following human task actions:

- Return
- Approve

- Reject
- Withdraw

To create the pre-approval validation, sales administrators must:

1. Create the validation in Application Composer as an object function under the MDF request object, Server Scripts link.
2. Create a site level profile option with a value that's the same as the name of the object function that will be invoked.

1. Create and Configure the Validation

Use the following steps to create and configure a validation for MDF requests that ensures a MDF request can only be approved if a budget is associated to it.

1. Sign in with your sales administrator credentials.
2. Ensure that you're in a sandbox.
3. Navigate to **Application Composer**.
4. From the list of Standard Objects, select **MDF Request**.
5. Select **Server Scripts**, then select **Object Functions**, and click **Create**.
6. On the Object Function page, provide the following:
 - Function Name: type a name for the function, such as **validateMDFRequest**.
 - Return: select **String**.
7. In the Parameters area, click **Create** and provide the following:
 - Name: type a name for the parameter, such as **parameter**.
 - Type: **String**.

8. In the Function Body area, type the following:

```
def context = parameter?.tokenize(';'); // Replace 'parameter' with whatever parameter name is defined in
the object function, in this case it is 'parameter'.

def stage = context[1];

def participant = context[3];

def user = context[5];

if(BudgetId ==null && stage == 'SoaOLabel.RequestBudgetFundRequestApprovalStageTwo'){ // This condition
is on the second stage which is final stage for the seeded flow

return "A Budget must be associated to Fund Request before the final approval"; // Error message to be
shown on UI if the validation fails

}

return null; // Return null otherwise, which means the validation is successful.
```

9. Validate the script and click **Save and Close**.

2. Create and Configure the Profile Option

Use the following steps to create and configure the profile option for the previous validation.

1. Sign in with your sales administrator credentials.
2. Ensure that you're in a sandbox.
3. Navigate to **Setup and Maintenance**.
4. Search for and select **Manage Profile Options**.
5. Create a new profile option with the following values:
 - Profile Option Code: MKT_FUNDREQUEST_APPROVE_VALIDATION_OBJFUNC (This is the code for Fund Request approve validation; the codes are predefined for object/action validation and must be defined exactly the same)
 - Profile Display Name: Fund Request Approve Validation Object Function
 - Application/Module: Marketing
 - Start Date: Provide a start date for the validation.
6. Click **Save and Close**.
7. Select the **Enable** check box for the profile option at the Site level only and select the **Updatable** check box at the site level only.
8. Click **Save and Close**.
9. Test the validation by approving the FundRequest without providing the Budget. It should display the message what was returned in the groovy. Once you complete the testing, you can publish the sandbox.

How do I access the Manage Service Mappings sandbox tool?

To access the Manage Service Mappings tool from within a sandbox, you must use the regular navigation. See [Options to Open Configuration Tools from Sandboxes UI](#).

How can I configure the Search and Select page for custom dynamic choice lists?

Search and select pages are accessed from dynamic choice list fields, and are predefined for standard objects and automatically generated for custom objects. You can hide and show the fields that display on search and select pages, as needed.

To configure a search and select page for an object:

1. In Application Composer, navigate to an object and click the Pages node.
2. On the Application Pages tab, scroll to the Reusable Regions region and edit the **Default custom layout**.

If the default custom layout doesn't yet exist, then duplicate the standard layout. You can also duplicate any existing custom layout.

3. On the Edit Search and Select Dialog Box Layout page, configure both the search and table regions of the search and select page.

For example, select which fields to show and hide. You can also rearrange the fields in the search region by moving the fields up and down inside the Selected Fields pane.

Related Topics

- [Configure a Search and Select Dialog Box for Custom Objects](#)
- [Configure a Search and Select Dialog Box for Standard Objects](#)

How do I change the Summary subtab name on the Leads page?

While you can change the name of other subtabs on the Leads detail page, changing the name of the Summary subtab on the Leads page isn't supported.

How can I make the opportunity's Win/Loss Reason field required?

To make the Win/Loss Reason field required when closing an opportunity, you can use the Close Opportunity Win/Loss Reason Required profile option (MOO_CLOSE_WINLOSS_REQD).

Why didn't search using the Contains option in the legacy CRM Search return the expected search results?

If there's an issue with the search results when you use the Contains operator, then the search results may not be properly indexed.

To index the records, run the Optimize CRM Search Indexes and Synchronize CRM Search scheduled processes. The Contains operator is only used in the work areas that still use CRM Search. Workspace and Sales in the Redwood User Experience use the newer Adaptive Search, a high-performance search engine which permits you to search using related information.

Related Topics

- [How do I run the processes that index the legacy CRM Search?](#)
- [Do I still need to run the Synchronize CRM Search Indexes process if I'm using Workspace?](#)
- [What do I do when the Synchronize CRM Search Indexes process is stuck or ends with an error?](#)

Can I import a Java package for use in Groovy scripts?

No, the import of additional packages isn't supported.

When writing Groovy scripts, you may use only the classes and methods that are documented. See [Classes and Methods Supported in Groovy Scripts](#).

Why can't I change the display name of a custom dynamic choice list field?

The presence of a data filter on the dynamic choice list might prevent you from changing the field's display name. Try removing the data filter before making other field configuration updates. After making your changes, you can add the filter back again.

How can I remove the Manage User Details link from the Edit Partner Contact page?

To remove the Manage User Details link from the Edit Partner Contact page, use Application Composer.

1. Create a sandbox with Application Composer enabled as a tool.
2. In Application Composer, expand **Objects** > **Standard Objects** > **Contact** > **Pages**.
3. In the **Edit Partner Contact region** > **Edit Subtab: Summary region**, open a custom layout and remove the **cl4** link from the **Selected Fields** list.
4. Publish your sandbox.

Related Topics

- [Overview of Dynamic Page Layouts](#)

Can I update a deal registration after submitting it for approval?

No. After submitting a deal registration for approval, the deal registration Summary page becomes read-only.

- If partners have submitted the deal registration in error or if they want to supply additional information, then they must withdraw a deal registration submission.
- If the deal registration approver requires additional information, then they can return the deal registration to the partner owner.

In such cases, the approver must specify a reason for the return.

Once the deal registration is in **Returned** or **Withdrawn** status, the partner can edit it and then resubmit the deal registration for approval.

Can I set a default value for a child fixed choice list field?

No. If you have two fixed choice list fields (list of value fields) that are in a hierarchical relationship, then you can't set a default value for the child field. This is because the available values for the child field are derived from the selection made at runtime for the parent field.

Related Topics

- [Fixed Choice Lists](#)

How do I search for records in Sales in the Redwood User Experience and in Workspace?

You can perform searches in the Redwood User Experience and Workspace by using a combination of search terms and operators. For example, when searching for an account, you might want to look for the account name, street address, primary contact name, and so on. Here are some tips and guidelines to enhance your search experience:

Search Tips

- Filter your searches by entering attribute names. As you type in the Search box, the application suggests possible filters. For instance, typing **prim** in an account search displays filters such as "Primary Industry," "Primary Address," "Primary Contact," and so on. Click a filter to see a list of values to choose from.
- To find a specific item, enter any word or part of a word in the item name or in related information, such as an address. For example, searching for **Angel** might retrieve "Vitamin Angels," "Los Angeles Rubber" and "Dominion Corp, 500 Angeles Avenue."
- The search function is designed to find similarly spelled words to yours. The most relevant items will always be displayed first. You can adjust the fuzzy match settings during setup. By default, the application shows spellings that differ by one letter if the first three letters match exactly. For instance, searching for "Cernar" might return "Cerner" or "Cernas."
- Keyword searches aren't case-sensitive. Whether you type "Pinnacle" or "pinnacle," you get the same results.
- You can enter multiple search terms separated by spaces. The spaces between words act as implicit "+" (plus symbol) operators. For example, searching for "Pinnacle Corporation" will find accounts with both "Pinnacle" and "Corporation" in the name, such as "Pinnacle Savings Corporation" or "Pinnacle Distribution Corporation."
- To refine your search on multiple search terms, use quotation marks. For instance, searching for **"Pinnacle Corporation"** will only return "Pinnacle Corporation" and any other records with those two words in that exact order.

- The * (star) symbol represents missing characters or partial words. You can place it at the beginning, end, or middle of a word. For example, `pres*` might return "Presto," "Press," or "Present." It won't return, "Xpres" or "Cypres."

Search Operators

- We recommend using the + (plus symbol), | (pipe symbol), and - (minus symbol) operators instead of the Boolean operators AND, OR, and NOT. For example, `+Oracle -Redwood city` returns Oracle locations excluding those in Redwood City.
- Note that if you don't use any operator and separate your search terms with spaces, it's considered an implicit AND. There's no need to add the + sign. For example, "Oracle Redwood" will return results containing both "Oracle" and "Redwood."
- The | (pipe symbol) operator makes it possible to search for multiple terms simultaneously. For instance, "Chicago | Pittsburgh" will find accounts in either city or with those terms in the name.
- The - (minus symbol) operator helps narrow down your search by excluding specific terms. For example, `oracle -Sunnyvale` returns Oracle locations except those in Sunnyvale. When using the - symbol with two or more words, enclose them in double quotes. For instance, `oracle -"San Francisco"` excludes Oracle locations in San Francisco.

What do I do when I get a BI report time-out error?

A time-out error in Oracle Business Intelligence Publisher means that you need to fine-tune your query. For example, you can add more filters and use more indexed columns.

View the Oracle recommendations in the Oracle support document [Oracle Business Intelligence Publisher Performance Recommendations for Fusion Cloud Applications \(Doc ID 2800118.1\)](#).

Can I modify creation page layouts in Application Composer to let users add attachments?

No. In Application Composer, you can add the attachments functionality to edit page layouts, but not to creation page layouts.

This means that if users wants to add attachments to a new record, then they must create and save the record first. They can then edit the record to add attachments.

Related Topics

- [Overview of Dynamic Page Layouts](#)

Can I add a Save and Continue button to subtab creation pages in Application Composer?

No. In Application Composer, you can't add a Save and Continue button to subtab creation pages. Subtab creation pages can have only a Save button.

This means that, when users create records inside a subtab, they must first save the record and then edit it to continue making changes.

Related Topics

- [Related Object Subtabs](#)
- [Child Object Subtabs](#)

Is there a maximum number of page layouts that I can create in Application Composer?

There's no maximum number of page layouts that you can create in Application Composer for an object. As a best practice, however, avoid creating too many page layouts. This keeps your layout management tasks simpler over future releases.

For example, a good target to aim for might be 3-4 creation page layouts and 6-8 details page layouts.

Note: To avoid creating too many layouts, use the UI properties on a field itself to control things like whether or not it's visible or updatable.

Related Topics

- [Overview of Dynamic Page Layouts](#)
- [Define Required, Updatable, and Hidden Properties for Fields](#)

How can I calculate the difference between the current date time vs. another date time using Groovy?

To calculate the difference between the current date time vs. another date time for any given row, you can use the Groovy sample script below.

Here's an example that uses the creation date for opportunities:

```
def dt2 = now();
```

```
def dt1 = CreationDate;

long diffInMills = dt2.getTime() - dt1.getTime();

println("Diff between Creation Date:" + CreationDate + " and today: " + dt2 );

println("The difference in milliseconds is:" + diffInMills );

println("The difference in seconds:" + diffInMills / 1000 );

println("The difference in minutes:" + diffInMills / (1000*60) );

println("The difference in hours:" + diffInMills / (1000*60*60) );

println("The difference in days:" + diffInMills / (1000*60*60*24) );
```

How can I get a list of all products and product groups?

You can get a list of all products and product groups in your sales catalog by creating an analysis in the Sales - CRM Opportunities and Products Real Time subject area.

Here's how to create a list of products and the product groups they're in:

1. Open the Reports and Analytics work area (**Navigator > Tools > Reports and Analytics**).
2. Click **Browse Catalog**.
3. Click **Create > Analysis** on the menu bar.
4. In the Select Subject Area window, search for and select **Sales - CRM Opportunities and Products Real Time**.
5. Open the **Product** folder. In this subject area, the attributes in the Products folder cover both Products and Product Groups. Product Groups and Products are differentiated by the value of the Product Group Flag attribute.
6. Move the following attributes to the Selected Columns list:
 - o **Product Name**
Displays both product names and product group names depending on the value of the filter Product Group Flag you add in step 8. In this example, we're creating a report on products, so the value of this filter is N.
 - o All the sales catalog hierarchy name fields from 1 to 8. These provide the structure of the products and product groups in your catalog, starting with 1 at the bottom of the hierarchy:
 - i. **Sales Catalog Hierarchy 1 Name**
 - ii. **Sales Catalog Hierarchy 2 Name**
 - iii. **Sales Catalog Hierarchy 3 Name**
 - iv. **Sales Catalog Hierarchy 4 Name**
 - v. **Sales Catalog Hierarchy 5 Name**
 - vi. **Sales Catalog Hierarchy 6 Name**
 - vii. **Sales Catalog Hierarchy 7 Name**
 - viii. **Sales Catalog Hierarchy 8 Name**
 - o **Sales Catalog Hierarchy Top Level Name**
The name of the root node, the top product group, in the sales catalog.
7. In the Filters section, click **Create a filter for the current subject area** (filter) icon and click **More Columns**.

8. In the Select Column dialog box, open the **Product** folder, select **Product Group Flag**, and click **OK**.
9. In the New Filter dialog, select the **is equal to/is in** operator.
10. In the Value field, select the **N** option as you're displaying a list of products.
11. Save your report.
12. On the Results tab, you can review the list of products and the product groups they're in.

If a product belongs to a product group higher in the hierarchy, its product name is repeated in a row. For example, the following table shows the partial row in the report for the 100kW Natural Gas Engine product. The product name is repeated in the level 1 and level 2 names because the product is a member of the Natural Gas Engines product group at level 3. The Natural Gas Engines product group (in level 3) is nested in the Engines product group (level 4).

Sample Report Row Showing the Product and Its Product Groups in the Catalog

Product Name	Sales Catalog Hierarchy 1 Name	Sales Catalog Hierarchy 2 Name	Sales Catalog Hierarchy 3 Name	Sales Catalog Hierarchy 4 Name
100kW Natural Gas Engine	100kW Natural Gas Engine	100kW Natural Gas Engine	Natural Gas Engines	Engines

Why is my sales pipeline not showing up in the Sales Dashboard?

The Sales Pipeline section in the Sales Dashboard displays the results of the My Dashboard analysis provided by Oracle. If your pipeline data doesn't match the filter criteria in the analysis, then no results show up in the Sales Dashboard. The My Pipeline analysis displays data only on open and won opportunities that use the Standard Sales Process sales method provided by Oracle and that are closing in the current fiscal quarter and in the next quarter. If your opportunities use a different sales method or don't meet the other criteria, then no pipeline data will appear in the Sales Dashboard.

To confirm if this is the issue, review the results of the My Pipeline analysis:

1. Open the Reports and Analytics work area (**Navigator > Tools > Reports and Analytics**).
2. Click **Browse Catalog**.
3. In the Folders window pane, open the following folders: **Shared Folders > Sales > Embedded Content > Sales Representative > oJet**.
4. With the **oJet** folder selected, open the **My Pipeline** analysis in the right-hand pane.
5. Click the **Results** tab.
6. If the analysis doesn't display any results, then you must create your own analysis and display it in the dashboard instead of the one supplied by Oracle.

Is Adaptive Search available for on-premise and U.S. government pods?

No. Many customers run their applications and Oracle databases in their own data centers on Oracle Cloud@Customer. Currently, Cloud@Customer pods and U.S. government pods don't support Adaptive Search.

Where can I find the lead Deal Size attribute for my BI analysis?

You can find the lead Deal Size attribute in multiple subject areas. For example, in the Sales - CRM Pipeline subject area, it's available in the **Facts > Lead Facts** folder. In this subject area, and in many others, Deal Size is renamed Potential Revenue.

Here's how to find all the subject areas that include Deal Size:

1. Download the spreadsheet for your release from the customer connect post [R13.x CX OTBI Subject Area to Database Lineage Mapping Spreadsheet](#).
2. Filter column G, **DATABASE_OBJECT**, on **MKL_LM_LEADS**.
3. Filter column H, **DATABASE_COLUMN**, on **DEAL_SIZE**.

Column A, **SUBJECT_AREA**, lists the subject areas where the attribute is available. Column B, **PRESENTATION_TABLE** lists the folders that contain the Deal Size attribute.

Note: In most of the subject areas, Deal Size is called Potential Revenue.

Here's a list of the subject areas, the folders, and attribute names for lead Deal Size in the 23C spreadsheet.

Subject Area	Folder	Attribute Name
Marketing - CRM Lead to Order	Lead Facts	Potential Revenue
Marketing - CRM Campaigns and Leads Real Time	Lead Facts	Potential Revenue
Marketing - CRM Campaign Performance	Lead Facts	Potential Revenue
Marketing - CRM Leads	Lead Facts	Potential Revenue
Marketing - CRM Leads Real Time	Lead Facts	Potential Revenue
Partners - CRM Leads and Opportunities Real Time	Lead Facts	Potential Revenue
Marketing Segmentation Leads	Lead	Deal Size
Marketing Segmentation Leads	Lead Facts	Potential Revenue

Subject Area	Folder	Attribute Name
Partners - CRM Partner Overview	Partner Registered Lead Facts	Deal Size
Partners - CRM Registered Leads Real Time	Partner Registered Lead Facts	Deal Size
Sales - CRM Customer Overview	Lead Facts	Potential Revenue
Sales - CRM Pipeline	Lead Facts	Potential Revenue
Territory Management - CRM Leads	Lead Facts	Potential Revenue

Do I need to run a process to activate a territory proposal?

You're no longer required to run the Activate Proposal process from the Run Territory Proposal Activation setup task to activate a sales territory proposal. This process is now scheduled to automatically run when needed.

How does the opportunity Predicted Win Probability get calculated?

Oracle Sales uses a built-in machine learning model to calculate the predicted win probability of a given opportunity using the historical data about your won and lost opportunities.

The model is automatically retrained on the prior 3 years' worth of data every month.

The model recalculates the Predicted Win Probability every 12 hours based on updates salespeople have made in the meantime.

For the Predicted Win Probability changes to be made visible in the UI, the opportunities must be first indexed for Adaptive Search. The indexing process, which runs often, indexes a record depending on the date and time of the last update (Last Updated Date). Any change to the record normally updates that date. Since many changes in the Predicted Win Probability are very incremental, however, Oracle prevents unnecessary reindexing of records by using the profile option AI Update Who Columns Threshold (ORA_ZCA_AI_UPDATE_WHO_THRESHOLD).

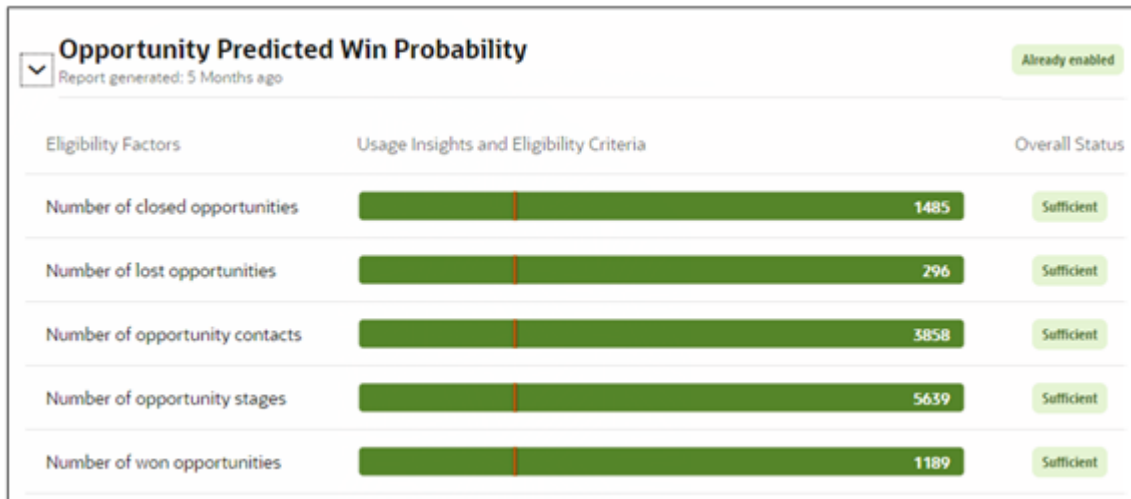
By default, if the Predicted Win Probability changes by less than 5 percent, there's no update to the Last Updated Date. You can set this profile to a different value by using the **Manage Administrator Profile Values** task in the Setup and Maintenance work area. The threshold you apply here also applies to changes in the AI Lead Score.

Note: Oracle provides an analogous model for calculating the AI Lead Score. The differences between the leads and opportunity models are only in the details.

When you enable the Predicted Win Probability feature, the application checks that you've enough historical data for the model to be trained. It checks you've at least the following:

- 1,000 closed opportunities
- 100 lost opportunities
- 1,000 opportunity contacts
- 1,000 opportunity stages
- 100 won opportunities

These are just the bare minimum requirements. Chances are that you won't get meaningful predictions on small numbers.



The model trains on the shape of your data for the different opportunity stages. Here are the objects the data is drawn from:

- Account
- Activity
- Contact
- Opportunity
- Opportunity Contact
- Opportunity Revenue
- Opportunity Stage Snapshot

The snapshot compares information in opportunities by stages. For example, it compares the activities in the initial Qualifying stage to the same stage in won and lost opportunities.

Attributes that don't include enough data are discarded. For example, if your opportunities typically include few contacts, the contact information will be excluded from the model and predictions. Attributes with lots of data are combined into features, which the model uses to make the predictions.

While you can't configure or copy the model itself, you can make some changes:

- You can exclude records from being used in the model training and predictions
For example, you can exclude opportunities that have completely different sales processes from those you're trying to predict, because including them would yield inaccurate predictions. If you're primarily selling

equipment, for example, you may want to exclude subscription renewals. You can exclude opportunities using multiple attributes, including sales method and sales channels, for example.

Excluded records still display the Predicted Win Probability field, but the field value is blank.

- Use custom attributes to train the model.

While you can't add attributes to the model, you can substitute custom attributes for a subset of the attributes included in the model. The following objects permit substitutions for a small subset of existing attributes:

- Activity
- Opportunity
- Opportunity Contact
- Opportunity Stage Snapshot

Here's a screenshot of the page where you can tweak the model with callouts describing the major features you can use to configure the model.

Predicted Win Probability Configuration Page

Callout	Description
1	Select the object you want to configure.
2	Specify the attributes and values that you want to use to exclude records. You can enter multiple filters.
3	You can replace the attributes listed under the Model Feature Configuration heading with your own custom attributes.

Opportunity Win Probability

Replace or remove attributes to use for the model

Opportunity

Save

Select records to exclude in the data set. Records meeting this condition won't be considered for opportunity win probability prediction.

Include all of

AttributeSales Method

OperatorEquals

ValueAccelerated Sales Process

Model Feature Configuration

Attribute Name	Attribute Internal Name	Data Type	Replace With	Action
PrimaryCompetitorId	opptyPrimaryCompetitorId	integer		
Revenue	opptyRevenue	number		
OpptyCreationDate	opptyCreationDate	datetime		
EffectiveDate	opptyCloseDate	date		

How does the AI Lead Score get calculated?

Oracle Sales uses a built-in machine learning model to score leads. From the AI Lead Score, salespeople can get an idea of the likelihood a lead will be converted to an opportunity. The application calculates the score, which can range from 0 to 100 percent, by finding patterns in historical data about your converted and lost leads.

The model is automatically retrained on the prior 3 years' worth of data every month.

The model recalculates the AI Lead Score in leads every 12 hours based on updates salespeople have made in the meantime.

For the AI Lead Score changes to be made visible in the UI, the leads must be first indexed for Adaptive Search. The indexing process, which runs often, indexes a record depending on the date and time of the last update (Last Updated Date). Any change to the record normally updates that date. Since many changes in the AI Lead Score are very incremental, however, Oracle prevents unnecessary reindexing of records by using the profile option AI Update Who Columns Threshold (ORA_ZCA_AI_UPDATE_WHO_THRESHOLD).

By default, if the AI Lead Score changes by less than 5 percent, there's no update to the Last Updated Date. You can set this profile to a different value by using the **Manage Administrator Profile Values** task in the Setup and Maintenance work area. The threshold you apply here also applies to changes in the Opportunity Win Probability.

Note: Oracle provides an analogous model for calculating the Opportunity Win Probability. The differences between the leads and opportunity models are only in the details.

When you enable the AI Lead Score feature, the application checks that you've enough historical data for the model to be trained. It checks you've at least the following:

- 1,000 closed leads
- 100 converted leads
- 1,000 lead activities

Activities include calls, meetings, and emails.

- 1,000 lead contacts
- 100 retired leads

These are just the bare minimum requirements. Chances are that you won't get meaningful predictions on small numbers.



The model trains on the shape of your data from the information in:

- Activities
- The information in the lead itself
- Lead contacts

Attributes that don't include enough data are discarded. Attributes with lots of data are combined into features, which the model uses to make the predictions.

While you can't configure or copy the model itself, you can make some changes:

- You can exclude records from being used in the model training and predictions using attributes from the leads themselves or from their activities
- For example, you can exclude leads for a subset of products that are different from the products you usually sell, because including them would yield inaccurate predictions. If you're primarily selling equipment, for example, you may want to exclude leads for subscription renewals. You can exclude leads using multiple attributes, including product groups, campaigns, and partners, for example.
- Excluded records still display the AI Lead Score field in the UI, but the field value is blank.
- You can train the model on custom attributes
- While you can't add attributes to the model, you can substitute custom attributes for some of the lead attributes included in the model. Only the Lead object itself allows substitutions for a small subset of existing attributes:

Here's a screenshot of the page where you can tweak the model with callouts describing the major features you can use to configure the model.

Lead Scoring Configuration Page

Callout	Description
1	Select the object you want to configure.
2	Specify the attributes and values that you want to use to exclude records. You can enter multiple filters.

Callout	Description
3	You can replace the attributes listed under the Model Feature Configuration heading with your own custom attributes.

Predictions for the AI lead score are made based on the model's learning from converted, lost, and retired leads. For a given lead, you can increase the score by changing the details of the lead to suit your requirements. For example, you can manipulate the prediction model of the AI Lead Score based on certain predefined attributes that are included as part of the model such as deal size. The model fine tunes the lead score based on your dataset including auto algorithm selections, automated feature engineering, and and hyper parameter tuning.

Note: The AI lead scoring model connects with AI apps instance for managing the data pipeline. There's no scheduled process job running for this purpose. Once a connection is established, data is imported and transformed at regular intervals. Currently, Oracle doesn't provide control over the frequency at which this activity occurs.

How can I update prices on product lines?

You can update a price for a product line by using a groovy script to pull the list price for a product from the selected price book and stamp that value in the Amount field on the product line.

Here are the steps.

1. Ensure you're working in an active sandbox.
2. In Application Composer, navigate to **Standard Objects > Opportunity > Opportunity Revenue > Server Scripts**.
3. Select the **Triggers** tab.

4. In the Server Scripts Opportunity Revenue page, in the Field Triggers section, select the **Add a New Trigger** icon. The page changes to the Create Field Trigger page, and the Trigger Type field defaults to **After Field changed**.
5. In the Create Field Trigger page, select **Product** for the Field Name.

Note: If there are two instances of Product in the list, select the first one.

6. In the **Trigger Name** field, enter `FetchPrice`.
7. In the Trigger Definition region, enter this script:

```
//Get the ID of the item:
def var_InventoryItemId = nvl(getAttribute('InventoryItemId'), (long) 0)
//Get the ID of the price book (this is useful if you have multiple price books):
def var_DCL_PriceBook = Opportunity?.PriceBook_Id_c //
//PriceBook is a dynamic choice list on the opportunity.
//Make a view of the PriceBookItem object, since that's where the prices for items are stored:
def view_PriceBookItem = newView('PriceBookItem')
def view_Criteria = newViewCriteria(view_PriceBookItem)
def view_criteria_row = view_Criteria.createRow()

//Define the first sort criteria. Basically, find all records in PriceBookItem that match the ID of the
//InventoryItemId on revenue.
def view_condition = view_criteria_row.ensureCriteriaItem('InvItemId')
view_condition.setOperator('=')
view_condition.setValue(var_InventoryItemId)

//Define the second sort criteria. If there are multiple price books that contain the same item with
//different prices, get the price of the item corresponding to the price book selected in the dynamic
//choice list on the opportunity.
def view_condition_1 = view_criteria_row.ensureCriteriaItem('PricebookId')
view_condition_1.setOperator('=')
view_condition_1.setValue(var_DCL_PriceBook)

//Execute the sort and query the records:
view_Criteria.insertRow(view_criteria_row)
view_PriceBookItem.appendViewCriteria(view_Criteria)
view_PriceBookItem.setMaxFetchSize(1400) //1,400 is the number of records in the system; change this
//number according to your system records.
view_PriceBookItem.executeQuery()

def var_price // This is a variable that will hold the price from PriceBookItem
while(view_PriceBookItem.hasNext()){
def var_Row = view_PriceBookItem.next()

//Get the price from PriceBookItem for the item you want:
var_price = var_Row.getAttribute('ListPrice')
}
//Assign the price to the revenue field UnitPrice:
setAttribute('UnitPrice',var_price)
```

8. Click **Save and Close**.
9. Verify that the FieldName in the Triggers section appears as `InventoryItemId`.
10. Test the changes and publish the sandbox.

How do I create a lead processing activity to run the lead assignment process?

Here's an example of how to create a lead processing activity to run the lead assignment process. It describes how to run the process to assign imported leads to the inside sales representatives for lead qualification. It also outlines how to assign qualified leads to field sales for conversion to opportunities.

Follow these steps to create a lead processing activity to run the lead assignment process:

1. Search for and open the task **Manage Lead Processing Activities** from the Setup and Maintenance work area.

The Lead Processing Activities page appears. This page lists all of your processing activities.

2. Click **Create Lead Processing Activity**.

The Create Lead Processing Activity window appears.

3. To assign the leads you previously imported to inside sales for qualification, enter the parameters listed in this table.

UI Region	Field	Entry
Activity Details	Process Type	Assignment
Lead Selection	Status	Unqualified
Lead Selection	Assignment Status	Unassigned
Schedule	Schedule Mode	Immediate

4. Click **Submit**.

5. Next, create and submit a second activity to assign the leads to field sales after the leads are qualified. Enter the parameters listed in this table.

UI Region	Field	Entry
Activity Details	Process Type	Assignment
Lead Selection	Status	Qualified
Schedule	Schedule Mode	Run this activity on a repeating schedule to make sure the leads are transferred to field sales as soon as they're qualified by inside sales.

UI Region	Field	Entry
		To run the activity regularly, select Repeats , enter a frequency, a start date, and an end date far into the future. You must enter both a start date and an end date for the process to run.

6. You can monitor the processes on the Manage Lead Processing Activities page. This page lists all of your processing activities.

Depending on your settings, your process runs immediately or at the intervals you specified. You can monitor its progress by searching for the job set process by name on the Overview page.

You can also set up the process to run regularly per your business requirements as follows:

1. Click **Advanced**.
2. Click the Schedule tab.
3. Select the **Using a schedule** option.
4. Select the frequency and start date.
5. Enter an end date far in the future.
6. Click **Submit**.

How do I enable multiple business units (BUs) for sales?

To enable multiple business units (BUs) for sales, you must set two profile options. Set the Multiple Business Units Enabled (HZ_ENABLE_MULTIPLE_BU_CRM) profile to Yes. You must also set the Customer Relationship Management Business Unit Default (HZ_DEFAULT_BU_CRM) profile to the default sales business unit.

Note: If you exported values for business unit profile options and then imported them into another environment, keep in mind that the values aren't retained, and you need to set them each time after export/import.

Here's how to set the profile options:

1. In Setup and Maintenance, go to:
 - o Offering: Sales
 - o Functional Area: Company Profile
 - o Task: Manage Common CRM Business Unit Profile Options
2. In the Manage Common CRM Business Unit Profile Options page, select the HZ_ENABLE_MULTIPLE_BU_CRM profile option and set it to Yes.
3. Click **Save and Close**.
4. Select the HZ_DEFAULT_BU_CRM profile option and set it to the default sales business unit.
5. Click **Save and Close**.

You also need to associate the business unit to the resource organization to which the user belongs to. For example, when your sales users work in business objects like opportunities and leads – and you're operating in a multiple-

business-unit environment – the users' access to the data is based on their involvement in business artifacts. See *What should I know about sales resources and multiple business units?* for more information.

What artificial intelligence (AI) features are integrated with Sales?

Your Oracle Sales application includes several analytics and artificial intelligence features that can help your sales organization improve sales efficiency and productivity. Both types of features are grouped underneath the term Sales Intelligence.

You can enable these features by using the Enable Sales Intelligence Features task from Setup and Maintenance work area.

The Sales Intelligence features use different technologies developed by different teams at Oracle:

- Generative Artificial Intelligence (Generative AI for Sales)

Generative AI refers to a specific subset of Artificial Intelligence (AI) tools that uses programs to process large data sets, detect patterns, and then create works of text based on the instructions it's given (known as prompts). Use Generative AI to help with authoring and recommendations for both short marketing content such as writing email, summarizing notes, or generating account description and so on. For example, Generative AI can automatically generate a win story highlighting the pertinent details of the data gathered during the sales process. These Generative AI features can help salespeople save time and effort so they can direct their focus and energies to the highest value-add parts of their work.

See the topic *What generative artificial intelligence features are integrated with Sales?* for more details about the current set of features available from Generative AI for Sales.

- 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. In 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.

- 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.

- 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. In Sales in the Redwood user experience, salespeople can review similar

accounts simply by entering "Show similar accounts" in the Action Bar. For the classic Sales UI, you must expose this feature using Application Composer.

Here's a list of the different Sales Intelligence features that you can enable by using the setup task Enable Sales Intelligence Features. When you enable a feature, the application determines if you've enough data to make the feature active. If the feature is available for setup, then 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
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.	Adaptive Intelligence

AI Feature	Description	Technology
	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.	

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
Opportunity Predicted Win Probability	Predicts win probability using historical data.	Adaptive Intelligence

View Explanations for Predictions

Feature	Description	Technology
View Explanations for Prediction Outcomes	Provides explanations of machine learning predictions with added insight into the highest impacting factors. For example, salespeople can take appropriate actions to mitigate any outcomes that negatively impact the prediction. They can also use the insights from positive factors to devise a sales strategy that plays to their unique strengths.	Machine Learning

How can I delete a partner?

You can't delete partner accounts, but you can inactivate them by changing the status to either **Expired** or **Terminated**.

When a partner account's status is **Terminated**:

- You can't modify existing user accounts of that partner or create new user accounts for that partner.
- You can still create new partner contacts.
- You must deactivate any existing user accounts that you don't want logging in, before you terminate a partner, because existing partner contacts and their user accounts are intact even after you terminate a partner.
- You can always change the status of the partner back to active to allow creation or modification of the user account again.

Why does an approved deal registration still show the option to submit it for approval?

If the user has either the Sales Administrator or Channel Operations Manager job role, then they will still see the Submit for Approval action even on approved deal registrations.

This is because sales administrators and channel operations managers can resubmit approved (or rejected) deal registrations to allow for the correction of any submissions made in error.

If, however, you don't want your sales administrators and channel operations managers to see the Submit for Approval action on approved deal registrations, then create custom job roles for those users with the Resubmit Deal Registration privilege (MKL_RESUBMIT_DEAL_REGISTRATION_PRIV) removed.

How you manage Personally Identifiable Information?

As a setup user, you can manage PII information in Oracle Applications Cloud.

In this example, you will add or update personally identifiable information (PII) data for your contacts. Before you can add or update the PII data, you must expose the PII attributes from Application Composer in an active sandbox.

Activate a Sandbox

1. Sign in as a setup user such as Sales Administrator.
2. From the Administration group in the **Settings and Actions** menu, select **Manage Sandboxes**.
3. Click **Actions** and then click **New**.
4. Enter a name in the Sandbox Name field.
5. Click **Save and Close**.
6. In the Confirmation dialog box, click **OK**.
7. In the Manage Sandboxes dialog box, select the sandbox you just created and click the **Set as Active** button.

Expose PII Attributes from Application Composer

The Taxpayer Identification Number and Home Phone PII attributes can be exposed from the Application Composer.

1. Navigate to **Application Composer**.
2. From the **Objects** View, select **Standard Objects**, **Contact**, and then **Pages**. Ensure Simplified Pages is selected.
3. To add the Taxpayer Identification Number and Home Phone PII attributes to the Create Contact page:
 - a. In the Create Contact section, select **Standard Layout** and click the **Edit** icon.
 - b. In the Create Contact region, click the **Edit** icon.
 - c. Move the **Taxpayer Identification Number** and **Home Phone** PII attributes from the Available Fields list to the Selected Fields list to add to the Create Contact page.
 - d. Click **Save and Close**.

- e. Click **Done**.
4. To add the Taxpayer Identification Number and Home Phone PII attributes to the Edit Contact page:
 - a. In the Edit Contact section, select **Standard Layout** and click the **Edit** icon.
 - b. Click the **Profile** tab to add the custom field.
 - c. In the Summary region, click the **Edit** icon.
 - d. Move the **Taxpayer Identification Number** and **Home Phone** PII attributes from the Available Fields list to the Selected Fields list to add to the Edit Contact page.
 - e. Click **Save and Close**.
 - f. Click **Done**.

Add and Update PII Data

1. Navigate to **Contacts**.
2. In the Contacts page, enter the name of the contact and click the **Search** icon.
3. In the Edit Contact page of the contact, click the **Profile** tab.
4. Enter the PII data such as the Taxpayer Identification Number and Home Phone, and click **Save and Close**.
5. In the Contacts page, click the **Create Contact** button.

Note: You can proceed to create a contact or click **Cancel** to exit without saving.

Publish the Sandbox

You can publish a sandbox after you have tested and verified that the modifications done in that sandbox are ready to be moved to the mainline metadata.

1. Select a sandbox link that appears on the page and click the **More** link.
2. In the Sandbox Details dialog box, click the **Publish** button.
3. Click **Yes** in the Publish confirmation message box.
4. Close the Manage Sandboxes dialog box.
5. From the Settings and Actions menu, click **Sign Out**.

Related Topics

- [How you protect Personally Identifiable Information?](#)
- [How you manage Personally Identifiable Information?](#)

What are the privileges or roles needed to access Resource Directory?

The Resource Directory icon is available in Tools menu only if you have the required privileges or roles.

Verify that you have the following job roles:

- Resource (ORA_HZ_RESOURCE_ABSTRACT)
- Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)

You should be able to access Resource Directory pages and the Sales Admin job role further granted access to "Identify Resources" functionality.

What are the survivorship rules for parties with custom objects and attributes?

This topic describes how to define survivorship rules for merging parties having custom objects and attributes.

For example, you can define a survivorship rule of the type Set Master Record to select the party with the maximum number of custom objects or the party with a specific attribute as the master. You can also define a survivorship rule of the type Set Attribute Value to select the smallest value for a specific attribute.

Custom Objects and Attributes

You can use Oracle Application Composer to configure and extend Oracle CX Sales and Fusion Service applications. The Application composer provides you the ability to extend an Oracle CX Sales and Fusion Service application's object model. You can configure CX Sales and Fusion Service objects by adding new fields (custom fields or custom attributes) to an existing object (standard objects). Or you create entirely new objects (custom objects) and related fields (custom attributes).

Custom Objects and Attributes in Survivorship Rules

The following table describes the basic merge operations that can be performed on standard or custom objects.

Object	Examples	Can be merged	Can be transferred	Can be removed
Standard Top-Level Object	Account/Organization Contact/Person	Yes	Not applicable for top-level objects	Not applicable for top-level objects
Standard Child Object	Address Phone	Yes (by reviewing in the Data Steward UI)	Yes (by default if not merged or removed)	Yes (by reviewing in the Data Steward UI)
Standard Child Object	Lead Opportunity	No	Yes (always)	No
Custom Top-Level Object	Not applicable (implementation specific)	No	Not applicable for top-level objects	Not applicable for top-level object
Custom Child Object	Not applicable (implementation specific)	No	Yes (always)	No

The following table describes whether or not these objects and attributes can be used while defining conditions, clauses, and actions for survivorship rules of the type Set Master Record and Set Attribute Value.

Object	Examples	Can be used in Set Master Record rule conditions	Can be used in Set Master Record rule actions	Can be used in Set Attribute Value rule conditions	Can be used in Set Attribute Value rule actions	Can be used for Attribute Override in Data Steward UI
Standard Top-Level Object	Account/ Organization Contact/Person	Yes (standard and custom attributes)	Yes (standard record ID attribute)	Yes (standard and custom attributes)	Yes (standard and custom attributes)	Yes (standard and custom attributes)
Standard Child Object	Address Phone	Yes (standard and custom attributes)	No, survivorship not supported for child objects	No, survivorship not supported for child objects	No, survivorship not supported for child objects	No, attribute override not supported for child objects
Standard Child Object	Lead Opportunity	Yes (standard and custom attributes)	Not applicable if you can't merge the records	No	Not applicable if you can't merge the records	Not applicable if you can't merge the records
Custom Top-Level Object	Not applicable (implementation specific)	No	Not applicable if you can't merge the records	No	Not applicable if you can't merge the records	Not applicable if you can't merge the records
Custom Child Object	Not applicable (implementation specific)	Yes (all attributes are custom)	Not applicable if you can't merge the records	No	Not applicable if you can't merge the records	Not applicable if you can't merge the records

How to edit the Summary page?

Edit the Summary page to edit the objects.

Edit a custom layout to do the following:

- Add fields, actions, links, buttons, and subtabs. If you add the Attachments field, then at runtime, users can add attachments to the record.
- Hide and show, reorder, and relabel regions, including subtabs.

To edit a custom layout:

1. In Application Composer, select the object that you want to create custom layouts for.
2. Expand the object in the object tree, and select the Pages node.
3. Select the Application Pages tab.
4. Find the type of page that you want to modify, such as a creation page layout or a details page layout. Click the Duplicate Layout icon to duplicate and edit an existing layout.
5. Design the page layout. Depending on how the page is designed, you can add fields, actions, links, and buttons.

You can also hide and show, reorder, and relabel regions.

If the page layout is for a details page, then you can also add and reorder subtabs, and add the Attachments field.

Note: Adding the Attachments field lets users add attachments to the record at runtime.

At runtime, while editing an object, you can mark the record as your favorite using the Add to favorites icon.

How do I import organization data?

You can use Import Management to create or update Organization records.

To import Organization records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the CSV file for a successful import.
- Ensure that you don't insert duplicate addresses while importing, to avoid redundant data.

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use

the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- **Source system and source system reference:** Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new organizations or are updating organizations that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Organization Object

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

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Organization Record	Updating an Existing Organization Record
SourceSystem	The original source system name	Know the source system. To view source systems, use the Manage Trading Community Source System task.	Conditionally Required To identify an organization record, use one of these: • Combination of SourceSystem and SourceSystemReferenceValue • PartyNumber	Conditionally Required To identify an organization record, use one of these: • Combination of SourceSystem and SourceSystemReferenceValue • PartyNumber
SourceSystemReferenceValue	The identifier in the original source system	Know the source system reference value. To view the source systems reference, use the Manage Trading Community Source System task.	Conditionally Required To identify an organization record, use one of these: • Combination of SourceSystem and SourceSystemReferenceValue • PartyNumber	Conditionally Required To identify an organization record, use one of these: • Combination of SourceSystem and SourceSystemReferenceValue • PartyNumber
PartyNumber	The public unique identifier of the party.	Know party number. To obtain a list of all party IDs and party numbers, export the Party object.	Conditionally Required	Conditionally Required
OrganizationName	The name of the party of the Organization party type.	The organization names are listed in the Resource Directory.	Required	Conditionally Required
PartyUsageCode	Specifies the party usage code to which the organization is associated	This should be an active value in the HZ_PARTY_USAGES_B table.	Required	Not required
CleanlinessScore	The overall score for the account or contact	No validation	Optional	Optional

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Organization Record	Updating an Existing Organization Record
	record for the category Cleanliness			
CompletenessScore	The overall score for the account or contact record for the category Completeness	No validation	Optional	Optional
DataConfidenceScore	The overall data confidence score that indicates the level of data quality for a record	No validation	Optional	Optional
DuplicateIndicator	Signifies the duplicate status of the record that's determined as follows: - A null value indicates that the record isn't a duplicate or hasn't been evaluated. - The record can also have one of 2 other values - DUPE (record is a duplicate) or LINK (record is linked to another record).	No validation	Optional	Optional
DuplicateScore	The overall score for the account or contact record for the category Duplicate	No validation	Optional	Optional
EnquiryDuns	A unique identifier used to query the Dun and Bradstreet data. If the location is a branch, in some countries the "DUNS" number of the headquarters is used to run the query. Otherwise, the "DUNS" number is considered.	No validation	Optional	Optional
EnrichmentScore	The overall score for the account or contact record for the category Enrichment	No validation	Optional	Optional
LastScoreUpdateDate	The date and time at which this record was updated by the source system in the last update source system column	No validation	Optional	Optional

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Organization Record	Updating an Existing Organization Record
RecencyScore	The overall score for the account or contact record for the category Recency	No validation	Optional	Optional
ThirdPartyFlag	This option tracks if a party has a direct relationship with the organization using Oracle receivables or through a third party supplier. The value Y denotes third party relationship, while the value N denotes direct relationship. If Oracle Service is installed, the Third Party field in the Customers window is mandatory.	No validation	Optional	Optional
ValidatedFlag	Indicates if the party was validated. The value Y denotes a validated party, while the value N denotes a party that's not validated.	No validation	Optional	Optional
ValidityScore	The overall score for the account or contact record for the category Validity	No validation	Optional	Optional

You can view the Organization object along with all its child objects and attributes in the Manage Import Objects page of the Import Management flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

1. Go to **Navigator > Tools > Import Management > Import Queue**.

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

Review the Import Results

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

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

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [How You Use Alternate Keys to Import Records](#)

How do I import account data?

You can use Import Management to create, update, or delete your account data.

You can import account records using these steps:

1. Map your source account data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the account data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import account data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.

- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .csv file for a successful import

Note: You can enable automatic territory-based assignment after sales accounts are imported. You can enable this feature by turning the profile option `ZCA_BATCH_ASSIGN_ON_BULK_IMPORT` ON. If the profile option is disabled, then you must manually run a batch assignment or assign each sales account individually.

To better manage your account information, the account object has the following child objects:

- Address
- Classification
- Relationship
- Sales Team Member

Note: You can't set an attribute value to NULL in high-volume import (import management with the option **Enable High-Volume Import** selected). However, when updating a record, you can change an attribute value from NOT NULL to NULL

If you're importing account records with attributes specific to the parent account object or along with single child record details (like phone, email, address, and so on), then you can include the child record details in the same .csv file for account object. However, if you're importing multiple records of any child object, then you must create multiple .csv files to import- one for each child which has multiple records that you're importing. For example, if you're importing 5 emails, 5 phones, and 5 addresses for an account, then you must create three import files - one for Account object, one for Contact Point object (phone and email), and one for Address object. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Note: High-volume import for accounts now supports hierarchy management and generation.

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data. For example, when using source system reference information to identify your account records, the source system of the account object should be enabled for parties using the Manage Trading Community Source Systems task.
- You have all parent records in place before importing child records. For example, when importing the address of an account, ensure the account exists.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- **Public unique identifiers:** If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named `<object> Number`. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For account object, the attribute is `PartyNumber` and shows up

in the UI as Party Number. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.

- **Source system and source system reference:** Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new accounts or are updating accounts that have source system reference data, then provide the source system and source system reference values. For account object, these are SourceSystem and SourceSystemReferenceValue and show up as Party Source System and Party Source System Reference Value in the UI.

Review Required Attributes and Validations for Account Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for account records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Account Record	Updating an Existing Account Record	Deleting an Existing Account Record
SourceSystem	The source system for the sales account.	Know the source system. To view source systems, use the Manage Trading Community Source System task.	Conditionally Required To identify an account record, use one of these: - SourceSystem and SourceSystemReferenceValue - PartyNumber	Conditionally Required To identify an account record, use one of these: - SourceSystem and SourceSystemReferenceValue - PartyNumber	Conditionally Required To identify an account record, use one of these: - SourceSystem and SourceSystemReferenceValue - PartyNumber
SourceSystemReferenceValue	The reference number or text representing the source system unique ID for the party (account or contact) to which the sales profile belongs.	Know the source system reference value. To view the source systems reference, use the Manage Trading Community Source System task.	Conditionally Required To identify an account record, use one of these: - SourceSystem and SourceSystemReferenceValue - PartyNumber	Conditionally Required To identify an account record, use one of these: - SourceSystem and SourceSystemReferenceValue - PartyNumber	Conditionally Required To identify an account record, use one of these: - SourceSystem and SourceSystemReferenceValue - PartyNumber
PartyNumber	The public unique identifier of the party.	The party must exist. You get a list of all party IDs and party numbers by exporting the Party object.	Conditionally Required	Conditionally Required	Conditionally Required
OrganizationName	The name of the party of the Organization party type.	Organization names are listed in the Resource Directory.	Required	Conditionally Required	Conditionally Required
OwnerPartyId	The identifier of the account owner.	This attribute is required only in import management,	Required	Not Required	Not Required

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Account Record	Updating an Existing Account Record	Deleting an Existing Account Record
		but optional in high-volume import.			

Note: When deleting or updating accounts, you must ensure that the account related to the party number provided has the Sales Account usage. If you provide the party number of an account that doesn't have the Sales Account usage, then the relationships for that account are also deleted. For example, if you provide the party number ORA17292 that doesn't have a Sales Account usage, then the related partners, contacts, and so on are also deleted.

For the extension child objects of account, RecordName field isn't unique. Hence you can't update the records only by passing RecordName.

You can use the profile option ORA_HZ_IMPORT_MULTI_ADDRESS_TYPE to control how address types are entered. By default this profile option is set to Yes, so you can enter multiple address types, during high-volume import of Account, Contact, and Household objects. You can disable this profile option to improve the import performance. When you set this profile option to No, you can enter only a single address type.

Note: When importing accounts or legal entities, you can retrieve duplicates using the Customer Data Management Duplicates LOV only if you have licensed the data quality functionality. Once licensed, you must rebuild the keys for your matching configuration using the Manage Enterprise Data Quality Matching Configurations task. After the keys are rebuilt, the matching functionality uses the settings in the match configuration to identify duplicates.

Go to **Navigator > Tools > Import Management > Import Objects** to see all the attributes of the account object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

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

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

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

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

Providing the ZIP and Country Code values in the import CSV file won't automatically populate the State/County/City fields. Values for these fields should be separately provided in the import file.

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

Create the Import Activity

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

1. Go to **Navigator > Tools > Import Management > Import Queue**.

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

Review the Import Results

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

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

Note: After importing your data successfully, you need to run a couple of post processing jobs for duplicate identification, duplicate resolution, and account assignment. For more information on import management post processing jobs, see the topic [Import Management Post Processing Jobs](#)

When importing accounts you can now load the account hierarchy data. Use the following attributes to import accounts:

- ParentAccountPartyId
- ParentAccountPartyNumber
- ParentAccountSourceSystem
- ParentAccountSourceSystemReferenceValue

You can load account hierarchy data. To load the account hierarchy data:

1. Load the account data without providing values for the parent attributes mentioned above.
2. Load the account hierarchy using the Hierarchy and Hierarchy Member import objects. For more information, see [How do I import hierarchy data?](#) and [How do I import hierarchy member data?](#)

Delete an Account

Related Topics

- [How do I import data?](#)
- [How do I import contact point data?](#)
- [Import Your Address Data](#)
- [How You Use Alternate Keys to Import Records](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [How You Enable Automatic Account Assignment](#)

How do I enroll into a partner program?

If the channel organization offers partner programs, a partner can enroll into a partner program and receive the benefits associated with that program.

Note: By default, partner users can't access partner program enrollments. To provide access, assign the ZPM_VIEW_PARTNER_PROGRAM_ENROLLMENT_PRIV and ZPM_APPLY_PARTNER_PROGRAM_PRIV privileges.

The process of enrolling into a partner program involves the following:

1. Select the partner program from a program catalog listed in the channel organization's application.
2. Confirm basic information like the organization, language, and so on.
3. Select a start date for the enrollment.

Note: The start date can't be past or prior to the active dates of the partner program. If partners don't specify a start date, the approval date of their enrollment becomes the start date for the enrollment.

4. Complete the questionnaire.
5. Accept the agreements associated to the partner program.
6. Review and submit the partner program enrollment request.

Related Topics

- [Synchronize User and Role Information](#)

What are the file-size limits for import?

You can import a maximum of 50,000 records per data file. This limit is applicable for files imported using the user interface and the REST service (low-volume). The size of the data file can't exceed 250 MB.

You can submit multiple jobs at one time. The application dynamically calculates the number of jobs that will run parallel at a time. All other jobs are queued and executed as and when the previous jobs complete.

Note: If you're using the importActivities REST service to submit jobs (also known as 'import activities'), then each job can contain up to 20 CSV files in the request payload. This means that 10 jobs, each with 20 CSV files of 50,000 records, can instruct the application to process up to one million records at a time.

To import much higher volumes of data, you must use the External Data Loader Client (EDLC). EDLC accepts files with more than 50,000 records. It breaks these larger files into smaller pieces of 50,000 each and imports them. Using the high-volume mode of EDLC, you can split and import in pieces of 500,000 records each.

Here are the file and record limits for Import Management:

Import Channel and Mode	Maximum Number of Files per job Submission	Maximum Records Processed in a Single Submission
User Interface (low-volume)	1 file (50k records)	50k records
REST Service (low-volume)	50k records per file	Unlimited (Must be manually split by the user into 50k record files)
EDLC (low-volume)	50k records per file	Unlimited (EDLC splits into 50k record files by default, and submits in a single REST call.)
User Interface (high-volume)	1 file (500k records)	Unlimited (Must be manually split by the user into 500k record files)
REST Service (high-volume)	500k records per file	Unlimited (Must be manually split by the user into 500k record files)
EDLC (high-volume)	500k records per file	Unlimited (EDLC splits into 200k record files by default, and submits in a single REST call.)

Note: Oracle recommends that you use EDLC (high-volume) import for the supported objects and that you limit the job to 2 million records with 20 files per job (around 100k records per CSV file). If you plan to run parallel import batches, Oracle recommends that you run a maximum of 10 parallel batches. User performance will vary based on your data and configuration. The recommendation of 10 parallel batches of 100 K records is a tip to get you started. You need to explore and identify the configuration that best suits your organization's requirements.

Note: Ensure that purge and imports aren't running in parallel for the same object at the same time.

Note: Split the data into multiple files if the import with large number of fields or 50k records fails.

Note: Order the records to have better performance. Keep all the child levels belonging to the same parent in the same file. Such as keep all the Subscription cover levels belonging to the same parent "Subscription Product " in the same file.

Related Topics

- [Set Up VB Studio to Extend Oracle Cloud Applications](#)

How do I import incentive compensation participants?

You can use the import management functionality to create or update Incentive Compensation Participants. You can specify the exact parties you want to import as participants.

You can import Incentive Participants using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file for import.
3. Create the import activity.
4. Review the import results.

How You Map Your Source Data to Target Object Attributes

You import Incentive Participants into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Incentive Participants import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Incentive Participants while importing, to avoid redundant data.

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for Incentive Participants Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

This table lists the required attributes for Incentive Participants, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Participant	Updating an Existing Incentive Participant
PartyNumber	The party number of the participant. This is used to find the party that's to be imported as a participant.	The PartyNumber must match an existing party.	Required	Required
Business Unit	Unique numeric identifier for the Oracle Fusion Incentive Compensation business unit	The business unit should be valid.	Required	Not Required
Type	Indicates whether the participant is an Analyst or Participant. Analysts	The valid values are ANALYST or PARTICIPANT.	Required	Not required for update. This field can't be updated

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Incentive Participant	Updating an Existing Incentive Participant
	administer and manage the application. Participants are individuals who can receive compensation or sales credits inside the application.			or changed after the participant is created.

Go to **Navigator > Tools > Import Management > Import Objects**, to see all the attributes of the Incentive Participants object. The page also lists attribute information like type, length, description, and so on.

Note: You can't update participant detail records through import after the initial creation. You can update them by creating a new import, via the UI, or through a REST call.

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

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

1. Go to **Navigator > Tools > Import Management > Import Incentive Participants**.

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

Related Topics

- [How You Use Alternate Keys to Import Records](#)
- [Potential Issues When Opening CSV Files in Excel](#)

How can I avoid creating a paysheet if the payment amount is zero?

You can't avoid creating a paysheet even if the payment amount is zero. This allows analysts to create manual adjustments, if needed.

However, to avoid unnecessary data validation and approvals on paysheets with zero amounts, use the Manage Parameters task in the Setup and Maintenance work area. Settings that you make using the Manage Parameters task affect payment processing, including paysheet approvals.

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Sales
 - Functional Area: Incentives
 - Task: Manage Parameters
2. Set the Default Paysheet Approval Status to Approved.
3. Set the Minimum Payment Automatic Approval Amount to 0.

Can I create a non-monetary earning type for plan components?

You can create a non-monetary earning type in Setup and Maintenance.

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Sales
 - Functional Area: Incentives
 - Task: Manage Earning Types
2. For each business unit that you need, create an earning type called **Non-monetary**.
3. **Note:** Don't set up any currency code for this earning type.

You can then associate plan components with this non-monetary earning type in the Compensation Plans work area.

How do I change the way the person's name is displayed in the home page welcome greeting?

You can change the name format in the welcome greeting by using the Manage Person Name Formats task in the Setup and Maintenance Work area. By default, the greeting displays the first name followed by the prefix and the last name. You can change it to any format. For example, you can display last name followed by the first name, the prefix and the last name only, or just address the person with the first name.

You can create your own formats, two for each country:

- A local format is suitable for users in a single legislation who prefer to see person names in the character set appropriate to their legislation.
- A global format is suitable for users in a multinational enterprise who prefer to see person names in a single (typically, Western) character set, so that all names, regardless of origin, have the same representation.

See the following topics for details:

Related Topics

- [Person Name Formats](#)
- [Apply Name Formats to Person Names, Keywords, and LDAP](#)

How do I ensure that workflow task notifications in the Global Header and Home Page are synchronized?

Users can get in-app notifications for the same workflow task in various UIs and email notifications. The **Synchronize Notifications in Global Header** scheduled process ensures that all the in-app notification UIs reflect the latest task status.

When workflow tasks are assigned to users, they can get an email and a notification in the global header and in the Things to Finish section on the home page. Updates they make to tasks from the global header, for example approving them, are automatically reflected in the Things to Finish section. Same goes the other way around, too.

But, the notifications don't immediately reflect changes to the task status if users act through email, the Worklist: Notifications and Approvals work area, or BPM Worklist. For example, after you approve a task from email, you can still see the notification in the global header and home page asking for approval. Another case like that's when a task is assigned to an approval group, and everyone in the group gets a notification. Say you approve that task from the Things to Finish section. Your notification is removed from that section and the notifications list in the global header, but the same notification is still there for everyone else in the approval group.

So, use the **Synchronize Notifications in Global Header** scheduled process to sync notifications with the latest task status for all users:

- This affects the notifications list in the global header, the Things to Finish section, and the Notifications page that shows all notifications, not just what's pending for the user.
- The process includes notifications not just for tasks that require action, but also ones that are just FYI.

- The process doesn't update the title of notifications in the global header, home page, or Notifications page. Like email subjects, the notification titles are static.

Note: No matter what the task status is, the scheduled process also removes notifications that are older than 30 days from the notifications list, Things to Finish section, and Notifications page.

Even when notifications aren't in sync with the latest workflow task status, users can still find the latest task status in the Worklist: Notifications and Approvals work area.

Schedule the Process

In the Scheduled Processes work area, submit the **Synchronize Notifications in Global Header** process to run on a schedule. It's recommended that you schedule the process to run every two hours. How often you should run the process depends on the volume of approvals. For example, there might be more during month-end or year-end activities. But if you do need to run the process more often, don't schedule it to run more often than every 30 minutes.

How long the process takes to run also depends on the volume of approvals. If you're running the process for the first time, or it hasn't run in a very long time, then the process might take hours to finish.

You need to have the Manage Scheduled Job Definition (FND_MANAGE_SCHEDULED_JOB_DEFINITION_PRIV) privilege to run this process. Your security administrator can assign a custom job role with this privilege.

What Happens After Synchronization

One key thing that affects what users see in the notifications list, **Things to Finish** section, or **Notifications** page is whether the workflow task is pending for the user. Here's an example of what happens before and after the scheduled process runs:

1. A notification is pending a user's approval.
2. The user approves the task from email. The task status changes, but the notification requesting approval is still in the global header and **Things to Finish** section.
3. After synchronization, because the task status is **Completed** and the task is no longer pending for the user, here's what happens to the notification:
 - It's removed from the list in the global header.
 - It's no longer a card in the **Things to Finish** section.
 - On the Notifications page, it moves from the **Assigned to Me** tab to the **All** tab.

How do I set up a notification when a user requests more information?

A notification is an alert for users, such as salespeople and managers, to notify them about an event on a business object. For example, when a contract approval ends in error, you can specify who should receive the notification to enable them to take necessary actions. The recipient of the notification could be the workflow initiator, approver, assignee, and so on.

An action or event might be a request for more information about the contract by one of the approvers. You can set up your approval flow to do this by selecting the **Assignees** settings for the recipient of the task in the BPM Worklist. Here

are the steps to set up the notification alert to ensure that a user receives a bell notification when contract approver selects **Request More Information**.

1. Sign in as a setup user.
2. Navigate to the **Setup and Maintenance** work area.
3. Search and select the **Manage Task Configurations for Customer Relationship Management** task.

The BPM Worklist page appears.

4. In the tasks to be configured region, select **ContractsApproval**.
5. In the Search box, search for the **ContractsApproval** task you're using for the object workflow.
6. Click the **Edit task** pencil icon from the toolbar, then click the **Notifications** tab.
7. Click the + (plus) icon.
8. From the **Task Status** drop-down, select **Request Info**.

ORACLE BPM Worklist

Tasks to be configured

Search: Show

ContractsApproval

Notifications

Task Status	Recipient
Request Info	ASSIGNEES
Complete	CREATOR
Error	OWNER
Withdraw	CREATOR
Assign	ASSIGNEES

☐ Enable Reminder

More

Available options are Assign, Complete, Error, Expire, Request Info, Update Outcome, Suspend, Withdrawn, Resume, Update, Alerted and All other Actions.

9. Then select who will receive the notification by selecting **Assignees** from the list of values of the **Recipients** column.
10. Click the **Save** icon and optionally enter comments.
11. Click the **Commit task** icon and optionally enter comments.
12. Test your workflow to verify your changes.

Why am I receiving notifications for contracts that have expired?

From the Manage Contract Types page you can choose to send notifications before contract expiration. If the setup is performed, the contact role to be notified will receive a notification when the **Send Contract Expiration Notifications** scheduled process is run and the condition is satisfied.

You can choose to deselect the **Notify before expiration** check box for a specific contract from the Edit Contract Type UI as shown:

Edit Contract Type: Construction ?

Overview

Class Enterprise contract

Intent Sell

* Set Common Set

* Buyer Role Customer

* Name Construction

* Seller Role Supplier

Description Construction

* Contract Owner Role Contract administrator

Code

Contract Layout Template

Terms Layout Template

* Start Date 1/1/00

End Date m/d/yy

✓ Allow lines

Line Class Project

☐ Enable automatic line numbering

☐ Requires signature

☑ Notify before expiration

* Days to Expiration 10

* Contact role to be notified Contract administrator

Contract Numbering Method Manual

Contract Numbering Level

Contract Sequence Category

What privileges do I need to run Contract Terms Deliverable Notification processes?

Contract deliverables establish and track both contractual and noncontractual commitments that must be honored as part of negotiations and contractual agreements between businesses and suppliers or customers based on contract intent.

You can send automatic notifications:

- Before the due date of the deliverable
- When one of the parties changes the status of the deliverable
- When a deliverable is overdue
- When a deliverable must be escalated after the due date

For notifications to appear, the following processes must be running:

- Send Contract Terms Deliverable Due Date Notifications
- Send Contract Terms Deliverable Escalation Notifications
- Send Contract Terms Deliverable Overdue Notifications

Note: You must have the OKC_DELIVERABLE_NOTIFICATIONS_PROCESS_PRIV (Send Contract Fulfillment Notification) privilege to run these processes.

You must also have the required roles to run the schedules processes. Use the Scheduled Processes work area to run all the processes you've access to and to manage submissions. If you need access to this work area, ask your security administrator to assign you a role that gives you access, for example a custom role with the Manage Scheduled Processes (FND_MANAGE_SCHEDULED_PROCESSES_PRIV) privilege.

Note: Oracle recommends that security administrators don't assign the required privileges to predefined roles directly to users. Instead, make a copy of a predefined role, remove the privileges that your users don't need, and assign users the role that contains only the privileges they need.

How do I automate creating resources from users with HCM jobs assigned to them?

You can automate the process of converting employee users you created in HCM into Oracle Sales and Service resources. You automate the process by mapping the HCM jobs to resource roles and enable the automation by setting a profile option. The resource roles get automatically assigned to users based on the mapping. Provisioning rules you've set up can then provision the required job roles and the resource abstract role.

The resource role to job mapping simplifies the task of assigning resource roles to new employees or contingent workers, resulting in time and cost efficiency. It works regardless if the employees are created in the UI or through import management.

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

Here's how to enable the automatic process and how to map HCM jobs to resource roles:

1. Set the Automated Resource Creation Enabled (HZ_AUTOMATE_RESOURCE_CREATION) profile option to Yes.
 - a. In the Setup and Maintenance work area, go to the following:
 - Offering: Sales
 - Functional Area: Sales Foundation
 - Task: Manage Administrator Profile Values
 - b. Use the **Profile Option Code** field to search for HZ_AUTOMATE_RESOURCE_CREATION and set the value to **Yes**.
2. Map the HCM jobs to their roles.
 - a. In the Setup and Maintenance work area, open the Manage Resource Roles task:
 - Offering: Customer Data Management
 - Functional Area: Resources
 - Task: Manage Resource Roles
 - b. You can create a role with the required details by clicking **Actions** > **Create** or edit an existing role by clicking **Actions** > **Edit**.
 - c. Scroll down to Job Mapping and click **Actions** > **Add Row**.
 - d. Search for and map the HCM jobs.
 - e. Click **Save and Close**.

How can I display a country?

If your business is operating in any country, you may want to enable it.

You may want to display a country from appearing in the list of countries, for example, while updating the address of a contact. This can be done in **Manage Territories**.

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance** work area.
2. Click the Tasks menu and click **Search**. Search for **Manage Territories** and open it.
3. Search the country you want to display using its **Territory Code** or **Territory Name**.
4. Select the **Enabled** column.
5. Click **Save and Close**.

Why is there a Target Release field in the initiatives?

The target release date is the market release date, that's the date on which the content of the initiative must be made available. This is an optional field for now.

When a sales VP or another manager leaves, how do I make territories and quotas reflect the new resource hierarchy?

If salespeople in your organization own and forecast their own opportunities (forecast by opportunity owner), then you can easily make the territory structure and quotas reflect changes at the top of the resource hierarchy by running a couple of scheduled processes.

You run the two processes from the Scheduled Process work area in the following order:

1. To update the territory hierarchy with the resource hierarchy changes, run the scheduled process Refresh Territories from Resources. No parameters are required.
2. To make the quota plan reflect the changes, run the Synchronize Quotas process after the Refresh Territories from Resources process has completed. Select the sales quota plan you want to update as a parameter.

Steps to Run the Processes

1. Click **Navigator > Tools > Scheduled Processes**.
2. Click **Schedule New Process**.
3. For **Type**, select the **Job** option.
4. In the Name field list, click **Search**.
5. Search for each process by name.
6. Select the process and click **OK**.
7. When running the Synchronized Quotas process, in the Parameters region of the Process Details page, select the sales quota plan.
8. Click **Submit**.

Related Topics

- [What do I do when I get an error when running the Refresh Territories from Resources process?](#)

Why are we getting the ORA-01795 error in BI Publisher?

The error indicates that there are too many values defined in the SQL filter for a given expression.

The option to pass more than one value to BIP SQL via bind parameters makes reports very flexible and versatile. However, BI Publisher doesn't limit the number of passed values, and it could generate a SQL with very large number of IN-LIST values, possibly hitting the internal Oracle limit of maximum 1,000 IN-LIST values.

Please review the recommendations in this support document and adjust your query accordingly: [Oracle Business Intelligence Publisher Performance Recommendations for Fusion Cloud Applications](#).

What's the name of the audit table for the Opportunity sales object?

The audit table name for the opportunity summary page is `MOO_OPTY_`. The audit table name for the opportunity revenue page is `MOO_REVN_`. Note the pattern `<table name> + '_'`.

All tables ending with the underscore are audit tables. See the [Tables and Views for Sales and Fusion Service](#) guide for more information.

How can I prevent users from deleting opportunities?

Smart actions make frequently used tasks, such as creating, editing, or deleting records, easily accessible because they're always available from the same place on a page, such as from the Workspace list page or in the Action Bar.

You can use the Smart Actions page in Application Composer to enable or disable actions. Or, you can allow or restrict access to specific actions through privileges that are granted for different roles. For example, the delete action for opportunities has the privilege `MOO_DELETE_OPPORTUNITY_PRIV` associated with it. If a user doesn't have this privilege, or if the privilege is revoked for the necessary role, then the delete smart action won't be available to that user.

What's LDAP authentication?

Lightweight Directory Access Protocol (LDAP) is an internet protocol used to access information directories. It lets users access centrally stored information over a network. There are several processes that are run by your security administrator to authenticate and manage the entries and attributes in a directory.

For example, run the **Retrieve Latest LDAP Changes** scheduled process once during implementation. This process copies data from the LDAP directory to the Oracle Fusion Applications Security tables. Thereafter, the data is synchronized automatically.

The **Send Pending LDAP Requests** process sends bulk requests and future-dated requests that are active to your LDAP directory. It's recommended that you schedule the Send Pending LDAP Requests process to run daily.

See the [Why You Run the Send Pending LDAP Requests Process](#) and the [Synchronize Your Sales Application with the LDAP Directory](#) from the Securing Applications guide for more information.

What are the best practices for managing Geography mismatches?

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

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

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

Use Case 1

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

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

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

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

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Customer Data Management
 - Functional Area: Enterprise Profile
 - Task: Manage Geographies
2. On the Manage Geographies page, search for the country by the name or country code, for example US.

3. Click the Go to Task button in the Hierarchy Defined column. The Manage Geographies Hierarchy page for the particular country appears.

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

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

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

Use Case 2

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

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

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

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

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

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

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

Related Topics

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How do I import plan component performance measure data?

You can use Import Management to create and update Plan Component Performance Measure records.

To import Plan Component Performance Measure records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite steps are complete, if applicable.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Required Attributes and Validations for the Plan Component Performance Measure Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

This table lists the required attributes for creating and updating Plan Component Incentive Formula records, prerequisite setup tasks for the attributes, and specific validations, if any, for Plan Component Incentive Formula records import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Plan Component Performance Measure Record	Updating a Plan Component Performance Measure Record
PlanComponentPerformance	The unique identifier generated internally that associates a plan component with a compensation plan.	None	Not Required	Required
PerformanceMeasureId	The unique identifier for a compensation plan.	Must be the identifier for an existing compensation plan.	Required	Required
PlanComponentId	The unique identifier of a plan component.	Must be the identifier for an existing plan component.	Required	Required
CalculationSequence	Indicates the order in which the calculation engine considers a performance measure within a plan component.	Must be a number. The default value is 1.	Not Required	Not Required
PerformanceMeasureWeight	The percentage of influence a plan component has on the compensation plan.	Must be a number. The default value is 100.	Not Required	Not Required
EarningBasis	Specifies whether attainment and earnings calculations use the same credit categories and whether the incentive formula uses the measure attainment in calculations.	Possible values include Y, N. The default value is Y.	Not Required	Not Required

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

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

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

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

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [How You Use Alternate Keys to Import Records](#)

Can I create a user role to run all scheduled processes?

You may have a set of scheduled processes that must be run often in your application. You may want to consolidate all privileges that are required to run that set of scheduled processes into one role.

Here are some pointers to do this:

- To access the Scheduled Processes work area, you require the Manage Scheduled Processes (FND_MANAGE_SCHEDULED_PROCESSES_PRIV) privilege.
- List all the roles and privileges that each scheduled process requires. For example, Schedule Custom Groovy Object Functions scheduled process requires the following roles and privileges:
 - Customer Relationship Management Application Administrator
 - Application Implementation Consultant
 - Master Data Management Application Administrator

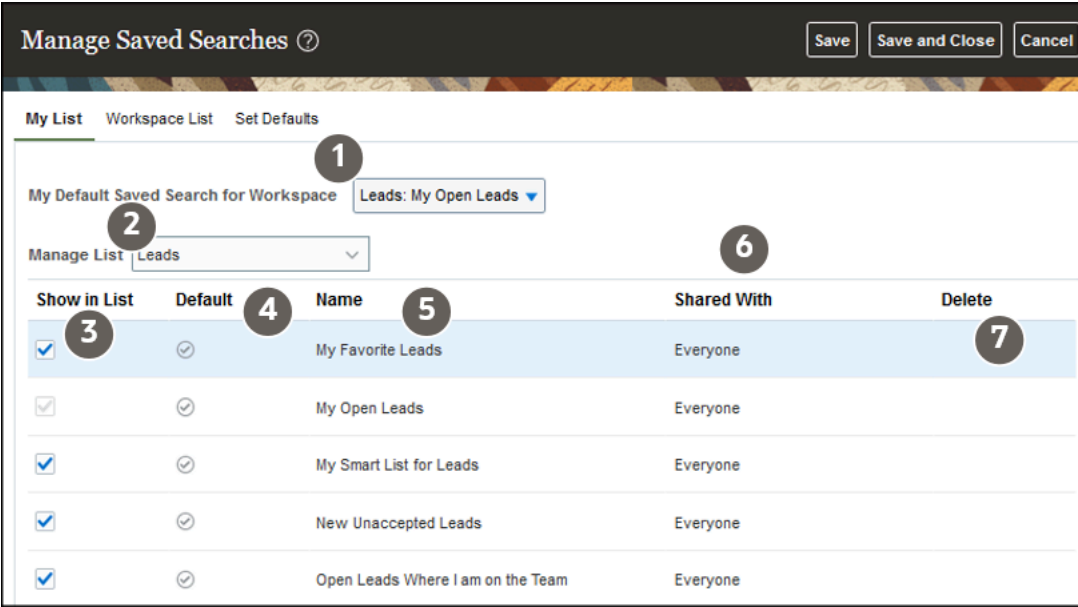
- ZCX_MANAGE_EXTENSIBLE_OBJECT_PRIV
- You can ask your security administrator to assign a custom role with these privileges.
- Also note that if a user is inactive, for example because they left the company, the processes they submitted on a recurring schedule won't run. For security reasons, it's best that you cancel that submission and schedule a new one if still needed. The same situation applies to users who are locked or failed to authenticate.

Can I rename my assigned saved searches in Workspace?

No. You can only rename your own personal saved searches. You can't rename other saved searches, such as those created or assigned by an administrator. While each business object has its own list of default saved searches, you can choose a saved search as your personal default and can change the name to suit your requirements from the **My List** tab on the **Manage Saved Searches** page.

Note: Only administrators can assign saved searches to different roles and assign default saved searches to different user roles.

The following screenshot shows an example of the Manage Saved Searches window as seen by users. The associated table describes the columns highlighted in the screenshot by callouts.



Callout Number	Column Name	Description
1	My Default Saved Search for Workspace	This is your personal default saved search. You can keep the default saved search assigned by

Callout Number	Column Name	Description
		the administrator, or change the saved search to a different one contained in the drop-down list.
2	Manage List	The business object containing the saved searches you're managing. For example, by selecting Accounts for Manage List, saved searches based on the Account business object are displayed. You can quickly switch between saved searches across objects. Once a new object is selected, saved searches related to that object are immediately displayed.
3	Show in List	The saved search appears in the list of saved searches only when this option is selected. While you can't delete lists provided by Oracle, you can hide them by deselecting the Show in List option.
4	Default	Each salesperson can specify one saved search for each object as their personal default. You see the results of your personal default saved search when you open work areas powered by Adaptive Saved search, including those in CX Sales Mobile in the Redwood User Experience. The personal default saved searches don't apply to the Workspace work area, as Workspace always opens to the default saved search you select in the My Default Saved Search for Workspace field.
5	Name	You can rename your own personal saved searches here. However you can't rename other saved searches, such as those created or assigned by an administrator.
6	Shared With	You can view but can't change the values here.
7	Delete	You can only delete your own personal saved searches. You can't delete saved searched provided by Oracle or an administrator.

How do I add a value to a new lookup I created on the Manage Standard Lookups page?

To add a value to a new lookup, make sure to add the value in the Tag column. For example, you created a new lookup **Activity Type**, and you created a start date for the lookup. If you need this value to show up in Tasks, for example, add a value such as :TASK:

If you need the value to show up in tasks and appointments, add a value such as :TASK:APPOINTMENT:

How do I change the record set values in Sales?

You can change the values that appear in the Record Set field list. Each record set value restricts a search to a subset of records.

If a value doesn't apply to your implementation, for example, you can remove the value from the list by entering an end-date. If you don't use sales teams or sales territories, you can remove all the values that restrict the search by sales team or by territory.

Change Record Set Lookup Values

1. Navigate to the Setup and Maintenance work area, and use the following:
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o Task: Manage Standard Lookups
2. In the **Meaning** field, enter %Record Set%.

3. Click **Search**.

The page displays a list of the lookup types for search filter record sets for the different sales objects. Here's a screenshot of the Manage Standard Lookups page showing some search results.

Manage Standard Lookups

SaveSave and CloseCancel

Search

Lookup Type

Meaning %Record Set%

Description

Module

SearchReset

Search Results

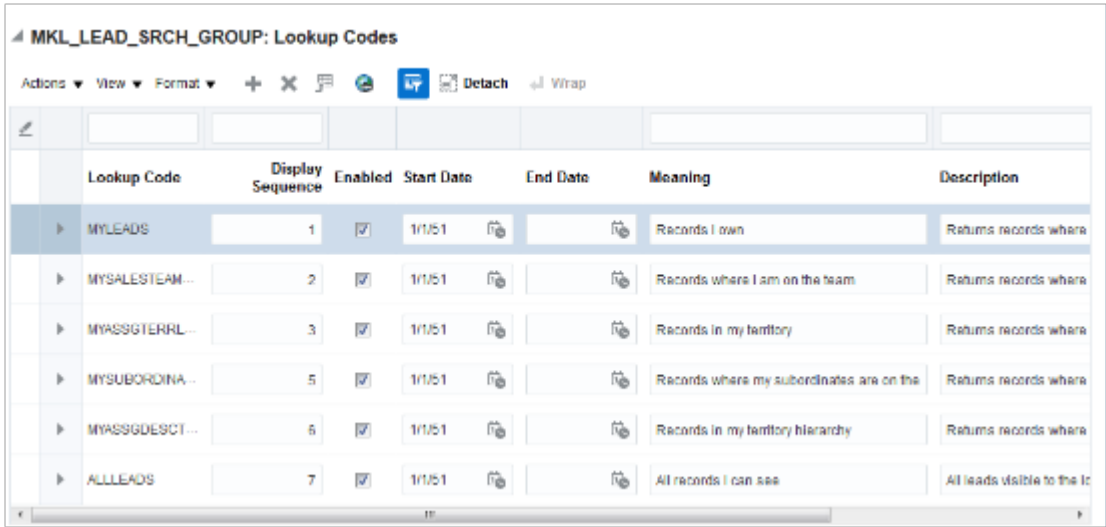
ActionsViewFormat+XRefreshDetachWrap

Lookup Type	Meaning	Description	Module
MKL_LEAD_SRCH_GRO...	Lead Search Filter Record Sets	Record visibility filters for lead search.	Sales Leads
MKT_SALESCAMP_SRC...	Sales Campaign Search Filter Record Sets	Record visibility filters for sales campaign s	Campaign Fundamentals
MOO_OPTY_SRCH_RE...	Opportunity Search Filter Record Sets	Record visibility filters for opportunity search	Opportunities

4. Select the lookup type you want to change in the search results.

5. You can edit the values in the Lookup Codes region. You must scroll down.

Here's a screenshot of the Lookup Codes region of the Manage Standard Lookups page for the Lead Search Filter Record Sets lookup type.



MKL_LEAD_SRCH_GROUP: Lookup Codes								
Actions View Format + X Print Attach Wrap								
	Lookup Code	Display Sequence	Enabled	Start Date	End Date	Meaning	Description	
▶	MYLEADS	1	☒	1/1/51		Records I own	Returns records where	
▶	MYSALESTEAM...	2	☒	1/1/51		Records where I am on the team	Returns records where	
▶	MYASSGTERRL...	3	☒	1/1/51		Records in my territory	Returns records where	
▶	MYSUBORDINA...	5	☒	1/1/51		Records where my subordinates are on the	Returns records where	
▶	MYASSGDESCR...	6	☒	1/1/51		Records in my territory hierarchy	Returns records where	
▶	ALLLEADS	7	☒	1/1/51		All records I can see	All leads visible to the l	

You can perform one or more of the following edits, depending on the lookup type:

- Change the wording the user sees in the list by editing the **Meaning** field.
Changing the meaning doesn't affect application functionality.
- Remove a value from use by entering an end date.
- Change the display sequence.

6. Click **Save and Close**.

What do I do to fix bell notification links so they open Oracle Sales in the Redwood user experience pages?

To open Oracle Sales in the Redwood User Experience pages, instead of the classic pages, from notifications, users must have the following privileges: ZBS_NOTIFICATION_DRILLDOWN_VBCS_PRIV and SVC_MANAGE_OMNICHANNEL_PRESENCE_AND_AVAILABILITY_PRIV.

These privileges are included in the sales job roles provided by Oracle. If these privileges are missing from your custom job roles, then add them. After adding the missing privileges, run these processes in the specified order. Ensure that each process completes before launching another.

Run Order	Process Name	Description
1	Send Pending LDAP Requests	Manages requests to create or update users, roles and role grants in LDAP.

Run Order	Process Name	Description
2	Send Personal Data for Multiple Users to LDAP	Syncs personal information with LDAP. You can sync all users or only those users whose information has been changed
3	Retrieve Latest LDAP Changes	Syncs users, roles, and role grants with definitions in LDAP.
4	Synchronize User GUID	Resolves invalid and missing user global unique identifiers by synchronizing them.
5	Import User and Role Application Security Data	Imports user and role data from LDAP to security application tables.

Can a report show opportunity revenue in both corporate and transaction currencies?

Yes, Business Intelligence (BI and OTBI) reports can display opportunity revenue totals in both the transaction currency and the corporate currency.

For details, see the document you can download from the support article [User Preferred Currency Usages in Business Intelligence \(BI\) \(1633382.1\)](#).

How do I specify the sales order numbering for orders created against service requests?

You can control how sequence numbers are generated for sales orders created from service requests by setting the profile option, Retain Sales Order Number for Orchestration Order Number (DOO_RT_USE_ORDER_NUMBER).

If this profile option is set to Yes, then the sales order numbers are the same as the service request numbers. If this profile option is set to No, then the sales order numbers are generated by Order Management.

How do I create or update Telephone Numbering Plans?

You can create Telephone Numbering plans or update existing Telephone Numbering plans such as pattern of digits, display formats, and so on.

You can update telephone number plans from the Manage Phone Numbering Plans page. You can't edit the country information if the country has area codes, mobile prefixes, or phone formats defined.

To create or update telephone number plans:

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

- Offering: Customer Data Management
- Functional Area: Trading Community Foundation
- Task: Manage Phone Numbering Plans

The Manage Phone Numbering Plans page opens.

2. Click **Actions > Create** to create. Else, search for the country whose telephone number plan you want to update. For example, to search for the United States, select United States in the Country Code list or enter 1 in the Phone Country Code field.
3. Select the country and click **Edit** to view the Edit Phone Numbering Plan page.
4. You can edit the following country-specific phone information in the Scheme section:
 - Trunk Prefix: The code to dial before long distance numbers within the country, for example 1 for the US.
 - International Prefix: The code to dial before international numbers when calling from the country that you're setting up, for example 011 for the US.
 - Subscriber Number Length: The length of the subscriber number for countries where the subscriber length is fixed.
 - Area Code Length: The length of the area code for countries where the area code length is fixed.
5. You can edit the following regional phone number information for the country in the Regional Information section:
 - Area Codes: Lets you define area codes that you want to use for the country.
 - Mobile Prefixes: Lets you define mobile prefixes that you want to use for this country. Mobile prefixes contain the area code and possible prefixes of the subscriber number. For example, the mobile prefix of 650506 consists of the 650 area code and the 506 subscriber number prefix.
 - Telephone Number Formats: Lets you define multiple telephone number display formats for a country.
6. Click **Save and Close** to save your updates.

Related Topics

- [Why can't I update the country information section in the Edit Telephone Numbering page?](#)

How can I import additional PIM attributes into Sales products?

While you can't import additional attributes, including descriptive flexfields (DFFs), using the standard scheduled process Import Sales Products From PIM Data Hub, you can create custom fields in the Sales application and then use Import Management to import the additional attributes into them.

For details, see the support document: [How To Import Products In Oracle Sales Cloud Application \(2233490.1\)](#).

How do I delete a saved search I created?

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

1. Navigate to the work area.
2. Click the search field and select **Manage Saved Searches**.
3. From the **Visible To** list, select **Me** to see the saved search 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**.

How can I set the Close Date field to be blank when I create an opportunity?

The Opportunity Close Date Default (MOO_DEFAULT_CLOSE_WINDOW) profile option determines the number of days to add to the current date when calculating the default opportunity close date. By default, your sales application automatically sets the Close Date to 20 days after today's date when you create an Opportunity.

If the default value of 20 days doesn't suit your business requirements, you can edit the Opportunity Close Date Default profile option to change the close date value. For example, you might want the **Close Date** field to always be blank when you create an opportunity. Here are the steps to change profile option.

1. In the Setup and Maintenance work area, go to:
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o Task: Manage Administrator Profile Values
2. From the search region of the Manage Administrator Profile Values page, enter the profile option code name (MOO_DEFAULT_CLOSE_WINDOW in the **Profile Option Code** field.
3. Click **Search**.
4. In the **Profile Value** field of the Opportunity Close Date Default profile, remove the default value of 20 and leave blank.
5. Click **Save and Close**.

When you next create an Opportunity, the Close Date field will now be blank.

How do I default a filter in a dashboard I embedded in the Analysis subtab of a Sales record?

You can make a report viewed in a record automatically display information about that record by adding the **is prompted** operator to the appropriate filters in your report.

1. Open the report in BI.
2. In the report Criteria subtab, click the **Filter** icon for the appropriate column. For **Operator**, select **is prompted**. Leave the other options blank.
3. Click **OK**.

For a complete description of how to create and embed a report in the Analysis subtab, see the topic: [How do I embed a BIP report in the Analytics subtab in a Sales record?](#)

Why can't I enable fields for the number of leads, opportunities, and activities for contacts in Adaptive Search?

You can't enable fields that show totals for Adaptive Search because Oracle is replacing the classic aggregate fields with Rollups. With Update 24B, all classic aggregate fields will be deprecated and no longer supported. Aggregate fields, including NumberOfOpenLeads and NumberOfOpenOpportunities for contacts, are now disabled in the Adaptive Search setup page. To achieve the same search functionality, you can enable the equivalent rollup fields instead.

Here's an overview of the setup:

1. Open the **Define Rollups** work area from Application Composer outside the sandbox.
2. Search for the rollup equivalent to the aggregate field you want to enable. For example, for NumberOfOpenLeads, search for Number of Open Leads.
3. Drill into the rollup and publish it (**Actions > Publish**).
4. Enable the rollup field for Adaptive Search and publish.

For setup details and information on what you need to do to transition from aggregate fields to rollups, please see the support document [Move from Classic Aggregates to Rollups \(2977196.1\)](#).

How can I notify the new task owner by email when the task is assigned to them?

Create a routine to notify the new task owner by email. Here's how.

1. Open Application Composer outside a sandbox (**Navigator > Configuration > Application Composer**).
2. Click **Routines**.

3. Click **Create Routine**.
4. Click **Skip Templates**.
5. In the Basic Details step, enter a name and description. For example: **Email Notification for New Task Owner**.
6. Select the **Object**, in this case **Activity**.
7. Click **Next**.
8. In the Trigger step, select **Attribute Changed** and then select **Owner ID** from the list of attributes. You're sending the email after the owner is updated in the record.
9. Click **Next**.
10. In the Actions step, select **Send Email** as the **Action Type**.
11. In the **To** field, select **Owner ID**.
12. In the **Subject** and **Body** fields, you can enter both text and mail-merge attributes.

For example, to include the task name in the Subject line of the email:

- a. Use the **Attributes** search box to search for **Subject**. This is the subject of the task.
- b. Select **Subject** and press **Return**.

Your action enters the mail-merge field `{{Subject}}`.

Note: The email sent to the new owner gets automatically appended with a link to open the task.

13. Click **Next**.
14. In the Rules step, you specify Task as the activity that will send the notification:
 - a. In the **Activity** list, select **Include all groups**.
 - b. Make these entries for the rule:

Field	Entry
Attribute	Activity
Operator	Equals
Value	Task

15. Click **Next**.
16. On the Review page, review your entries and click **Submit**.

How do I embed a BIP report in the Analytics subtab in a Sales record?

Here's how you can embed a Business Intelligence Publisher (BIP) report in the Analytics tab on the edit pages of any of the sales object records, including accounts, opportunities, and leads. You can use the same procedure on service request and partner pages as well. The report shows information for each individual record. This procedure applies only to pages in the classic user experience. It isn't applicable to Sales in the Redwood user experience.

Here's an overview of the setup:

1. In Business Intelligence, set the "Is Prompted" filter. This setting displays data specific to the record.

2. Enable the subtab on the object page.
3. Add the report to the subtab on the object page.

The following steps use the Opportunities landing and edit pages as an example. You can use these same steps for other sales and service objects, including service request, work order, and queue.

Set the "Is Prompted" Filter

To show data specific to the record, you enable the "Is Prompted" filter on the name or object ID for the report.

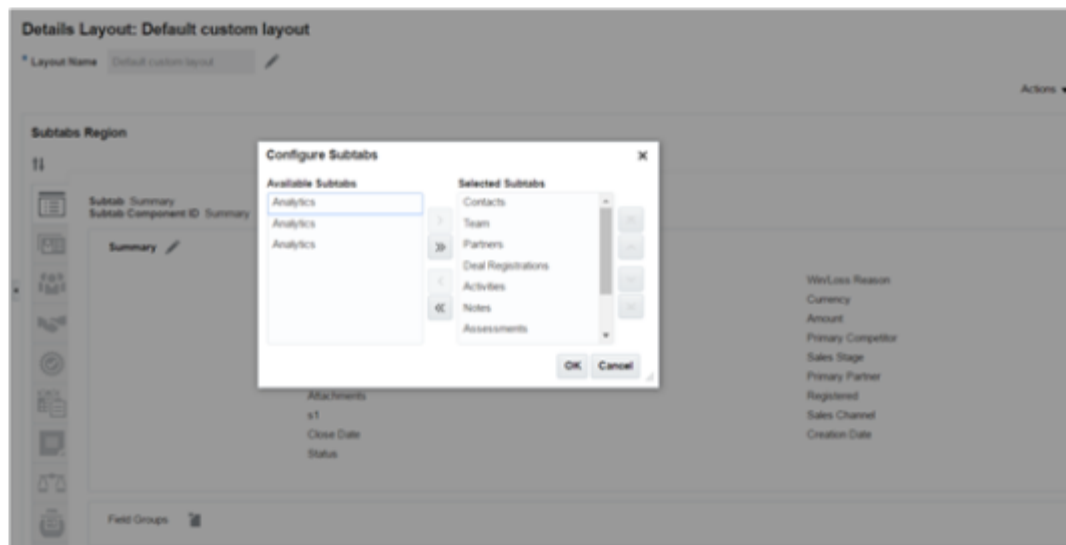
1. Open an existing report, or create a new report in BI.
2. In the report Criteria subtab, select the Filter icon for the appropriate column. Under **Operator**, select **is prompted**. Leave the other options blank.
3. Click **OK**.

Enable Object Edit Page Analytics Subtabs

This procedure uses the Opportunity object landing page as an example. The procedure is the same for all object edit pages.

1. In Navigator click Application Composer.
2. Select **Sales** from the Application drop-down list.
3. Expand **Standard Objects** and go to **Opportunity**.
4. Under Opportunity click **Pages**.
5. Under **Detail Page Layouts** copy the standard layout or select an existing created layout where the Analytics subtab is added.
6. Click the Reorder subtab.

This shows the Configure subtab option for the edit object page.



7. Click **OK**.
8. Click **Done**. The Analytics subtab now shows on the Edit Opportunity page.

Add Analytics to Edit Object Subtabs

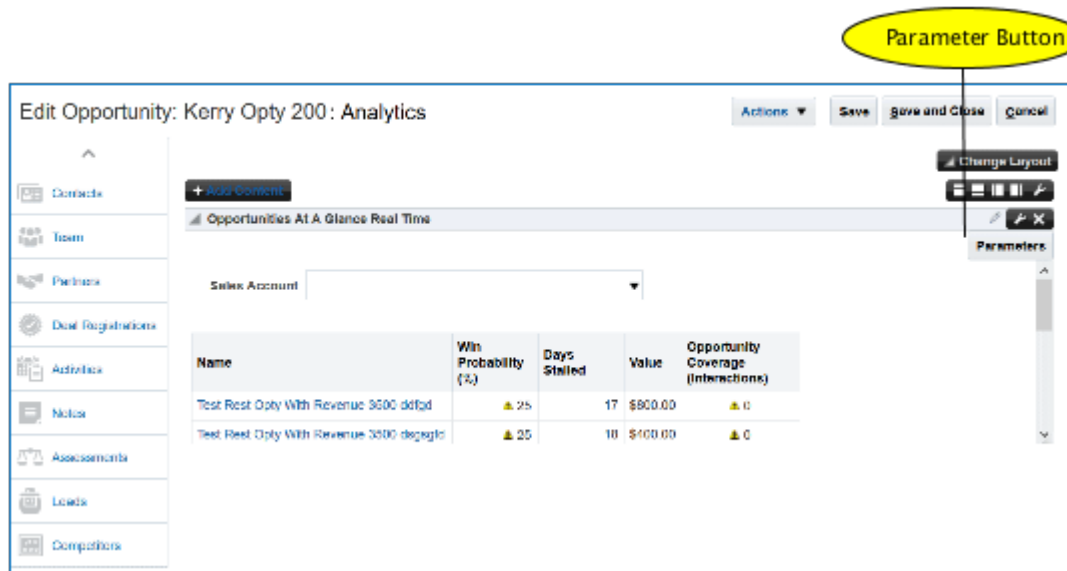
The final step is to add an analysis to the Edit Object subtab you've just enabled. When an analysis is added to the object page, it shows data specific to the signed in user's transaction record. The specific data shows because of the

"is prompted" filter being set in the analytic which passes parameters from the transaction record to the analytic. A parameter is visible in the analytic when a filter prompt is added.

1. At the top of the Home Page click the arrow next to your name and select Edit Pages. The Edit Pages dialog appears.
2. Select **Job Role** and choose the role to which your change should apply. Any analytics you add in this context apply only to the role you define here.
3. In Opportunities on the analytics subtab click **Add Content** and navigate to the analysis you want to show on the Opportunity page.
4. Click **Add** next to the analysis and close the dialog. The analysis is now added to the Analytics subtab.
5. Next step you want to either save the default parameters, or add parameters specific the object your are working with.

Click **Parameters**.

This shows the Parameters button on the Edit Opportunity analytic.



6. The parameter used is `pageFlowScope` variable and is set by default for Opportunity, Leads, Partners, Service Request and custom object pages. For example, in the case of Opportunity the parameter is `#pageFlowScope.biFilterName_OpportunityOpportunityId`. In the case of Service Request it's `"#{pageFlowScope.biFilterName_ServiceRequestServiceRequestId}"`. If for any reason the parameter field is blank, insert the variable manually and save it.

This shows the parameter value of `#pageFlowScope.biFilterName_OpportunityOpportunityId` on an Edit Opportunity ID analytic column `..#pageFlowScope.biFilterName_OpportunityOpportunityId` on an Edit

Opportunity ID analytic column.

Parameters

Type	Column	Oper	Value 1	Value 2
filter	"Employee"."Employee Login"	in	Employee Login	
filter	"Opportunity"."Opportunity ID"	in	#{pageFlowScope.biFilterName_Opportunity}	
filter	"Opportunity"."Opportunity Status C..."	in	Opportunity Status C...	

7. For the objects that aren't prepopulated with the `pageFlowScope` parameters, you can use one of these `sessionScope` variables depending on which object page you're on, and the columns available in the analytic.
- o Customer ID: `#{sessionScope.zcmAnalyticsCustomerId}`
 - o Contact ID: `#{sessionScope.hzAnalyticsContactPartyId}`
 - o Contact Name: `#{sessionScope.hzAnalyticsContactName}`
 - o Lead ID: `#{sessionScope.mklAnalyticsLeadId}`
 - o Opportunity ID: `#{sessionScope.mooAnalyticsOpportunityId}`
 - o Partner ID: `#{sessionScope.zpmAnalyticsPartnerId}`

How do I enable account team members to edit accounts?

Only account team members with Full access can edit all account information. By default, only account owners have Full access. Members of the territories on the account have only view access. Using access groups, you can automatically grant the Full access to any set of users, including the team members added through territories, or you can grant access to specific individuals.

Create the Access Group to Enable Edit Access

In this example, you create an access group that enables users with the Sales Representative job role to edit all account information when they're members of the account territory. If your use case is different, then you can use other criteria to select users or add individuals and you can add multiple access permissions.

1. As a user with the security manager role, such as a setup user, open the Sales and Service Access Management work area (**Navigator > Tools > Sales and Service Access Management**).
2. On the Access Groups tab, click **Create**.
3. In the Create Access Group page, enter a name and select **Active**.
4. Click **Save and Continue**.
5. Click the **Object Rules** tab.
6. On the Object Rules tab, **Object** field, select **Equals** as the operator and **Account** as the object.
7. Click **Add Rule**.
8. Select the predefined rule. For example, to add access to territory team members on the account, click **Account Territory Team**.
Tip: You can review a description of the access each rule provides by drilling into it.
9. Click **Done**.
10. Specify the **Access Level**. Select **Full** for edit access.
11. Click the **Member Rules** tab.
12. On the Member Rules tab, click **Create Rule**.
13. Enter a rule name, for example: **Sales Reps**.
14. In the Conditions section, click **Add Rule** (plus sign icon).
15. Make these entries to provide access to all users with the Sales Representative job role:

Field	Entry
Object	Resources
Attribute	Roles (Roles)
Operator	Equals
Value	Sales Representative

16. Click **Actions > Save and Publish**.
17. When the **Published Status** shows **Published**, click **Save and Close**

Run Processes to Apply the Expanded Access

Run the **Run Access Group Membership Rules** and **Perform Object Sharing Rule Assignment Processing** processes to apply the expanded access to accounts so you can test it. These two processes are run automatically on a schedule, so you'll need to wait until they run if you don't run them.

1. Open the Scheduled Processes work area. (**Navigator > Tools > Scheduled Processes**).
2. Click **Schedule New Process**.
3. In the Schedule New Process window, with the Job option selected, click **Search: Name** (the down arrow button).
4. Click the **Search** link at the end of the list.
5. Enter the name of the process: **Run Access Group Membership Rules**.

6. Click **Search**.
7. Select the process and click **OK**.
8. In the Process Details window, **Record Selection**, select **All Records** or another value.
9. Click Submit.
10. Now search for and run the **Perform Object Sharing Rule Assignment Processing** process.

In the Process Details window for this process, select **Account** as the **Object** and **All Records** as the **Record Selection**.

Can I see change history for Oracle Sales in the Redwood User Experience?

In Oracle Sales in the Redwood User Experience (Sales in the Redwood UX), salespeople can see the history of updates to key sales information on the View All Activities page on each record (the activity stream). You can view the audit of all changes on the Change History subtab of a record in the Sales classic user experience.

The View All Activities page in the Redwood UX is designed with salespeople in mind. Sales in the Redwood UX doesn't include a Change History subtab, but all the changes in your Redwood application tracked by your audit setup are visible in the Sales classic UI Change History page.

Related Topics

- [Audit Configuration for Business Object Attributes](#)

How can I create approvals for activities such as appointments?

You can create approvals for activities, opportunities, and other objects using object workflows to trigger business process workflows. Using Oracle Business Process Manager (BPM) you can create different types of approval workflows, including group approvals, parallel approvals, and multiple approvals on a single record. For details, see the topic [Object Workflows and Business Processes](#).

How do I set up Activities for Oracle Sales in the Redwood User Experience?

Here's a summary of the set up steps to enable Activities for Oracle Sales in the Redwood User Experience:

Step	Description	Navigation
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
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
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
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're listed as a resource. Like all natural-language processing in Sales, this feature uses Oracle Digital Assistant (ODA) to process the text.	Setup and Maintenance > Sales > Digital Assistant > Manage Digital Assistant
5	Set the profile option Set the Common CRM Signals Active (ORA_ZCA_ENABLE_SIGNALS) to Y .	Setup and Maintenance > Sales > Sales Foundation > Manage Administrator Profile Values

Can a task template assign a task to a specific user?

Yes. You can configure object workflows to trigger auto-creation and assignment of tasks.

For more information, see [Create Tasks](#) in the Configuring Applications Using Application Composer guide.

How can I send reminders to an activity owner until the activity is completed?

You can create and send email reminders to activity owners to complete tasks, appointments, and call reports by using the Routines feature.

The Routines feature, available in Application Composer, makes it easy to ensure timely completion and keep your team on track.

- **Flexible scheduling:**
Send reminders daily until tasks are done and set to the Complete status, or only when they're overdue.
- **Targeted notifications:**
Choose to focus on specific objects (like opportunities) or send reminders for all tasks, even those without a related object.
- **Extensible templates:**
Easily create reminders using the Past Due Tasks template as a starting point.
- **Direct links to open the activity:**
Reminders include convenient links for salespeople to directly access and complete their tasks.

Note: Existing customers must enable both the **Digital Sales Next Gen UI** and **Sales in the Redwood UX** features in Setup and Maintenance to enable notification links to open records in the Redwood user experience. For details see the section [Set the Notification Link to Open the Redwood UI](#).

Here's an example of how you'd set up a daily reminder to complete all tasks that aren't set to the status of Complete by the date the routine is run:

1. Open **Application Composer** outside the sandbox. (**Navigator Configuration Application Composer**)
2. Click the **Routines** icon.
3. In the routines list page, click the **Create Routine** button.
4. Click the **Past Due Tasks** template.
5. In the Basic Details page enter a name and description for the routine. These aren't visible to the users you notify.
6. The **Object** is **Activity**.
7. Click **Next**.
8. On the Trigger page, specify when this routine will be run. To send daily reminders, select Daily.
9. Click Next.
10. On the Actions page, make modifications to the Send Email action provided in the template. Here are some sample values:

Field	Entry
To	Owner ID
Subject	Reminder: Complete task {{\$Subject}}with the due of {{\$DueDate}}.
Body	Please complete the task and update the status to complete or canceled.

11. Click **Next**.
12. On the Rules page, enter the rules. The template includes rules for tasks with a priority equal to 1, that are due in the previous 7 days, and that are associated with an object. (The template ignores stand-alone tasks).

In this example, we're sending the email notifications to owners of all tasks that aren't set to the complete or canceled status by the due date. We're including due dates on or before the date the routine is run.

- a. Change the rules in the first group to the following:

Field	Entry
Attribute	Activity
Operator	Equals
Value	Task

Field	Entry
Attribute	Due Date
Operator	Until
Value	Run Date
Operator	<leave blank, or select plus or minus>
Value	<leave blank, or enter number of days>

Field	Entry
Attribute	Status
Operator	Not In
Value	Complete, Canceled

- b. You can delete the second group of rules from the template unless you want to restrict your notifications to tasks with objects or add other rules.

13. Click **Next**.
14. Review routine and click **Submit**.
15. The routine is now active and appears in the list of routines.
16. From the **Actions** menu (three dots), you can run the routine immediately. From this menu, you can also take other actions: you can pause, edit, and delete the routine, for example.

Set the Notification Link to Open the Redwood UI

Existing customers must enable both the **Digital Sales Next Gen UI** and **Sales in the Redwood UX** features in Setup and Maintenance to open records in the Redwood user experience. New customers can skip this step as the feature is enabled automatically.

1. Open the **Setup and Maintenance** work area. (**Navigator** > **My Enterprise** > **Setup and Maintenance**).
2. Make sure the **Sales** offering is selected.
3. Click the **Actions** button and select **Change Feature Selection**.
4. Make sure both **Digital Sales Next Gen UI** and the **Sales in the Redwood UX** features are enabled.
5. Click **Done**.

Why don't my custom fields appear in the add-in?

The Microsoft 365 Outlook add-in in the classic Sales user experience gets data from the Sales application through a REST API call. If the custom fields you created aren't included in the REST service Include in Service Payload, your users can't find those fields in the add-in.

To add the fields to the service payload, go to Application Composer in the sales application and open your custom field record. Select the **Include in Service Payload** check box and save your changes.

Note: Oracle recommends that you use the Redwood User Experience version of the Microsoft Outlook add in. To get started, see [Overview of Microsoft 365 for Redwood UX](#) in the solution playbook, [How do I implement Microsoft 365 for Oracle Sales Redwood UX?](#).

Can I request an environment clone with only some of the data?

Environment clones and environment refreshes always follow standard processes.

For details, see the article on [My Oracle Support, Oracle Applications Cloud Service Definition - Environment Refresh \(Doc ID 2015788.1\)](#).

How do you add additional match identifiers while configuring match attributes for Duplicate Identification?

You can't add any additional match identifiers while configuring Match Attributes for Duplicate Identification.

Here is a work around to add any additional match identifiers while configuring Match Attributes for Duplicate Identification. Navigate to Manage Enterprise Data Quality Matching Configurations setup option and copy or edit an existing configuration.

In the Match Attributes section, perform the following steps:

1. Select a row to edit the mapping, and click the drop-down button for the selected row.
2. Select the relevant attribute from the list.
3. If the list doesn't display the attribute that you want for the mapping including published custom fields, then click Search to search for the attribute. Select the relevant option and click OK.

Note: To identify duplicates based on a custom field search the custom attribute in the Account attribute drop-down and then map it to any available unused EDQ attribute.

4. Select the relevant option and click **OK**.
5. Click Save.

Is it possible to create an Owner without having to create a user with a license assigned?

No, this is not possible. Owners must be resources, which means they must be created as users. To create users, a license is required.

How can I expand the Addresses region by default?

You can use the Page Composer settings to keep the Address region on the Contact page expanded.

Go to Page Composer and select Disclosed option on the Properties tab of the address component. This ensures that the Address region on the Contact page remains expanded. This reduces the number of clicks to view the Address region.

How do I import contact data?

You can use the Import Management to create, update, or delete contact records.

You can import contact records using these steps:

1. Map your source contact data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the contact data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

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

You must do the following before creating the .csv file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .csv file for a successful import

To better manage your contact information, the contact object has the following child objects:

- Address
- Classification
- Relationship
- Sales Team Member

Note: You can't set an attribute value to NULL in optimized import (standard import with the option **Enable High-Volume Import** selected). However, when updating a record, you can change an attribute value from NOT NULL to NULL

If you want to import only a few records, then you can create a single CSV file for all contact attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the contact child objects. Note that you must have imported the CSV file for contact object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- **Public unique identifiers:** If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- **Source system and source system reference:** Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new contacts or are updating contacts that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for the Contact Object

To import data successfully into Oracle Applications Cloud, your .csv file must include the required attributes. Ensure that you provide valid values for the attributes.

This table lists the required attributes for contact records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task or Import Validations	Creating a Contact Record	Updating an Existing Contact Record	Deleting an Existing Contact Record
SourceSystem	The code representing the source system for the contact.	Identify the source system or configure source systems either by using the Manage Trading Community Source System task, or by importing the source system information into Oracle Applications Cloud using the Source System Reference import object.	Conditionally Required For uniquely identifying a contact record, provide one of the following reference information: - SourceSystem and SourceSystemReferenceValue - PartyNumber	Conditionally Required For uniquely identifying a contact record, provide one of the following reference information: - SourceSystem and SourceSystemReferenceValue - PartyNumber	Conditionally Required For uniquely identifying a contact record, provide one of the following reference information: - SourceSystem and SourceSystemReferenceValue - PartyNumber
SourceSystemReferenceValue	The reference number or text representing the source system unique ID for the contact.	Identify the source system or configure source systems either by using the Manage Trading Community Source System task, or by importing the source system information into Oracle Applications Cloud using the Source System Reference import object.	Conditionally Required For uniquely identifying a contact record, provide one of the following reference information: - SourceSystem and SourceSystemReferenceValue - PartyNumber	Conditionally Required For uniquely identifying a contact record, provide one of the following reference information: - SourceSystem and SourceSystemReferenceValue - PartyNumber	Conditionally Required For uniquely identifying a contact record, provide one of the following reference information: - SourceSystem and SourceSystemReferenceValue - PartyNumber
PartyNumber	The public unique identifier of the contact.	No prerequisite tasks	Conditionally Required	Conditionally Required	Conditionally Required
FirstName	First name of a person party.	No prerequisite tasks	Required	Not required	Not required
LastName	Last name of a person party.	No prerequisite tasks	Required	Not required	Not required

Note: For the **Time Zone** import attribute, specify the time zone of the contact to know the preferred time to call or send e-mail to the contact.

You can use the profile option `ORA_HZ_IMPORT_MULTI_ADDRESS_TYPE` to control how address types are entered. By default this profile option is set to Yes, so you can enter multiple address types, during high-volume import of Account, Contact, and Household objects . You can disable this profile option to improve the import performance. When you set this profile option to No, you can enter only a single address type.

Go to **Navigator > Tools > Import Management > Import Objects**, to see all the attributes of the contact object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

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

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

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

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

Providing the ZIP and Country Code values in the import CSV file won't automatically populate the State/County/City fields. Values for these fields should be separately provided in the import file.

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

Create the Import Activity

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

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

Review the Import Results

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

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

Note: After importing your data successfully, you need to run a couple of post processing jobs for duplicate identification, duplicate resolution, and account assignment. For more information on import management post processing jobs, see the topic: Import Management Post Processing for Accounts and Contacts.

Related Topics

- [Potential Issues When Opening CSV Files in Excel](#)
- [How You Use Alternate Keys to Import Records](#)

How do I import person data?

You can use import management to create or update Person data.

You can import Person records using these steps:

1. Map your source data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the Person data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import Person data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

Before you create the source data file, you should:

- Know how your source data attributes map to the target object attributes in Oracle Applications Cloud. Match each column from the source file to an attribute in the Person import object.
- Finish all prerequisite steps, such as understanding what attributes are required for importing your objects.
- Know how you can uniquely identify the records.
- Check the target object attributes required in the CSV file for a successful import.
- Ensure that you don't insert duplicate Person while importing, to avoid redundant data.

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: You can pass the PUID when creating Person records. If the PUID isn't passed, it will be auto generated. You can optionally provide the PUID when creating Person records. If you're updating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new Persons or are

updating Persons that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Person Object

To import data successfully into Oracle Applications Cloud, your .CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

This table lists the required attributes for Person records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Person record	Updating an Existing Person record
PartyId	The internal ID for the Person type party	When updating the record, this should already exist.	Not required	Conditionally required. To identify a person record, use one of these: - Combination of SourceSystem and SourceSystemReferenceValue - PartyNumber - PartyId
Country	The country code of the postal address	Identify valid country codes using the Setup and Maintenance, Manage Territories task.	Conditionally required A value is required only when you're creating an address for the Person record.	The attribute is neither required nor conditionally required.
AddressNumber	The internal unique identifier that's internally generated when creating an address	No validation	This is a PUID for Address. If a value is passed, it will be imported. Otherwise, it will be auto-generated.	Pass the AddressNumber.
OrganizationPartyNumber	The party number of the organization to which the person is related	This should already exist.	Not required	Not required
DeceasedFlag	The option that indicates whether the person imported is deceased	Y or N The default value is N.	Not required	Not required
PartyNumber	The unique identifier of the party	Know the party number. To obtain a list of all party IDs and party numbers, export the Person object.	This is a PUID for Person. If a value is passed, it will be imported. Otherwise, it will be auto-generated.	Conditionally required To identify a person record, use one of these: - Combination of SourceSystem and SourceSystemReferenceValue - PartyNumber - PartyId

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Person record	Updating an Existing Person record
FirstName	The first name of the person	No validation	Required. A value is required for the FirstName, MiddleName, or LastName.	Not required
MiddleName	The middle name of the person	No validation	Required. A value is required for the FirstName, MiddleName, or LastName.	Not required
LastName	The last name of the person	No validation	Required. A value is required for the FirstName, MiddleName, or LastName.	Not required
PartyUsageCode	Specifies the party usage code to which the person is associated	Select one of the following values: - EXTERNAL_PAYEE - CONTACT - PAYMENT_ISSUING_AUTHORITY - PARTY_OF_INTEREST - VIRTUAL_ASSISTANT - FS_TECH You can assign a limited set of unrestricted party usages through the Person import object. To create persons of other types, use the specific import objects created for those purposes.	Required	Not required
SourceSystem	The original source system name	Know the source system. To view source systems, use the Manage Trading Community Source System task.	Conditionally required To identify a person record, use one of these: - Combination of SourceSystem and SourceSystemReferenceValue - PartyNumber	Conditionally required To identify a person record, use one of these: - Combination of SourceSystem and SourceSystemReferenceValue - PartyNumber - PartyId
SourceSystemReferenceValue	The identifier in the original source system	Know the source system reference value. To view source system reference, use the Manage Trading Community Source System task.	Conditionally required To identify a person record, use one of these: - Combination of SourceSystem and SourceSystemReferenceValue - PartyNumber	Conditionally required To identify a person record, use one of these: - Combination of SourceSystem and SourceSystemReferenceValue - PartyNumber

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Person record	Updating an Existing Person record
				PartyId

Go to **Navigator > Tools > Import Management > Import Objects**, to see all the attributes of the Person object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

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

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

Related Topics

- [How You Use Alternate Keys to Import Records](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [Why can't I see the people I just imported?](#)

How do I import using the external data loader client?

This topic describes how to import using the External Data Loader Client tool.

You can use the tool to split a source file into multiple smaller files for upload and then import. This lets you import large files that exceed the import size limits. You can split a CSV file in one of two ways:

- Independently - the specified CSV file can be split based on selected parameters and no import is performed
- As part of import - the specified CSV file is split and then each of the resulting files is uploaded and then imported

The following steps are involved in using the tool:

- Submit Import Jobs
- Review Status of Import Jobs
- Retrieve Log Files

Submit Import Jobs

The submit operation, takes the source single CSV file, splits the file into smaller files (if necessary), uploads those files to the **Webcenter** Content Repository and then imports the files. When executing the client from the command line, you must provide the URL of the pod to run the import, the user credentials for authentication, the import object name, the import map number, and the import source file name.

```
> java -jar oscdataloader.jar submit -target-url https://mypod.oracle.com -username importuser -input-file Account.csv -import-name "Account Import" -object Account -mapping-number 123565
```

If multiple import activities are created due to splitting of files, then import activity name values are the same. The file name values are suffixed with a count value. For example, if the source file Account.csv is split into two files, then file name values are called Account_1.csv and Account_2.csv.

Note: If the target isn't open through public internet, it wouldn't be accessible through public internet.

You can retrieve the list of imports that have recently run on a server using the `listimports` command. For example,

```
> java -jar oscdataloader.jar listimports -target-url https://mypod.oracle.com -username importuser
```

lists the imports as a table in the command window. An example of the output would contain the following information:

Identifier	Name	Object	Attachment Object	Start Time	End Time	Status	Submitted By	Activate
0123456789012	Account Import 20170410	Account	N/A	20170410 14:56T05:00	20170410 16:56T05:00	Completed	John.Doe	Yes
787878787878	Opportunity Sync	Opportunity	N/A	20170411 17:06T05:00	20170411 20:06T05:00	Completed with errors	John.Doe	Yes

Note: You should place the import source files in local folders while using EDLC. Remotely mounted files might cause performance issues.

Review Status of Import Jobs

To get the status of an import activity, enter the identifier value of the import on the command line. For example:> `java -jar oscdataloader.jar getlogs -target-url https://mypod.oracle.com -username importuser -log-type Exception -import-activity 012345678912345`

This command displays the detailed status of the matching import request (if no matching request is found, then an error is displayed). An example of the output contains the following information:

Object	Attachment Object	Status	Start Time	End Time	Number of File Splits	Records Read	Successfully Loaded	Errors Reported	Warnings Reported
Account	N/A	Completed	20170410 14:56T05:00	20170410 17:36T05:00	2	50,000	49,950	50	0

Retrieve Log Files

You can get the log files generated by an import activity using the `getlogs` command. For example,

```
> java -jar oscdataloader.jar getlogs -target-url https://mypod.oracle.com -username importuser -log-type Exception -import-activity 012345678912345
```

Log files retrieved by the `getlogs` command are stored in the `importlogs` folder by default. Log file of the External Data Loader Client is stored in the `oscdataloaderlogs` folder.

Can I select which record to retain as the master while merging records?

Yes, when merging records to resolve duplicates, you can specify which record to retain as the master.

You can do this when:

- manually creating duplicate resolution requests

- overriding the system mapping for merge requests
- set the Master Record Selection profile option which controls the method used to identify which record in a duplicate set becomes the master during a merge

Create Duplicate Resolution Requests Manually

When you're sure that two or more records are confirmed duplicates, you can decide to create a duplicate resolution request manually using the following steps:

1. Navigate to the Duplicate Resolution work area as follows: **Navigator > Customer Data Management > Duplicate Resolution**.
2. Click **Tasks** and then click **Create Resolution Request**.
3. Search for the records that you want to merge, link, or test merge. For example, select the Party Type as Person and enter the Name as John, and click Search.

Note: You can only search on standard fields using the Advanced Search option. Custom fields of the Accounts or Contacts objects aren't available.

4. Select two or more duplicate records using the Shift or Control key.
5. Click **Actions > Create Request**.
6. Enter a name for the request in the **Create Request: Select Type** dialog.
7. Select the request type as Generic, Merge, Link, or Test Merge. You can also select the Master Record, if needed.
8. Click **OK**.

You can also submit request dispatch jobs directly from the Duplicate Resolution work area by clicking the Dispatch button, which will submit the job for immediate processing.

Override System Mapping

You can override system mapping for merge requests by manually modifying it. To manually modify system mapping, you must select the master record and its associated attributes, and then specify the resolution for the child entity conflicts and errors.

You can resolve child entity conflicts and errors by merging, transferring, or removing the record attributes.

You can override system mapping using these steps:

1. Navigate to the Duplicate Resolution work area as follows: **Navigator > Customer Data Management > Duplicate Resolution**.

2. Select the duplicate resolution request for which you want to override system mappings and drill down through the request ID to the **Review Merge Request** page.

Note: You can override system mappings only for those merge requests that are in New status, which indicates that the request is open for review and processing. The status depends on the following:

- The merge request isn't an auto-merge request and the profile option ZCH_USER_MERGE_REQUESTS is set to Process Subject to Approval. For more information about this profile option, see Customer Hub Profile Options topic listed in the Related Links section.
- Your administrator has run the Run Request Dispatch Job from the Setup and Maintenance area to change the merge request status from Pending to New. A request dispatcher is run periodically for pending merge requests, and sets the status of pending requests to New. You can also request your administrator to run the Run Request Dispatch Job from the Setup and Maintenance area to set the status of the pending requests to new. A setup user can access this task in the Setup and Maintenance work area, using the following:
 - Offering: Customer Data Management
 - Functional Area: Customer Hub
 - Task: Run Request Dispatch Job

3. Click **Override** on the **Review Merge Request** page to view the **Override System Mapping: Select Master Record** page.
4. In the duplicate set on the page, select the record that you want to make the master and click **Set Master**.

Optionally, you can also remove records from the duplicate set to prevent them from being merged. You can also mark the removed record as a nonduplicate to exclude it from all the subsequent merge requests.

5. Click **Next** to navigate to the **Override System Mapping: Map Profile Attributes** page.
6. Select a value from any of the duplicate records for each profile attribute to be retained in the master record.

If the number of duplicate records is five or less than five, you can select the value from the record columns. If the number of duplicate records is greater than five, you can select the value from the value choice list. In the profile attribute value choice list, you can hover over the value to see the attribute value's record. This helps you associate the correct value with the master record. You can also manually enter a new value in the **Final Value** column for an attribute.

7. On the **Override System Mapping: Map Entities** page, you can merge two or more entities into a single entity. You can also remove merge entities, such as addresses, from the merge processes by clicking the Remove icon. If the Remove icon isn't available, you must enable the ORA_ZCH_ALLOW_REMOVE_FEATURE profile option. For more information about creating this profile option, see the Enable the Remove Option on the Override System Mapping UI section in this topic. Child entities associated with the entities that are removed using the Remove icon won't be transferred to the master record.
8. Click **Next** to view the **Override System Mapping: Review** page. Now you can review the mapping settings and click Submit to override the default system mappings. In case there are edits, click Back to make updates to the mapping settings before submission.

Controls the method used to identify which record in a duplicate set becomes the master during a merge.

The options are:

- Select master record using survivorship rule: Logic configured with Oracle business rules using the Manage Survivorship Rules setup task determines the master.
- Select the oldest record as master: The record with the earliest creation date is the master.
- Select the latest record as master: With the most recent creation date is the master.
- Select master based on duplicate identification results: Internal logic of the duplication identification process determines the master.
- Select master record using Data Quality Rules: Logic configured with Application Composer Data Quality Rules determines the master.

Consider these points:

- The Select the older record as master and Select the latest record as master options use optimized internal processes and may offer the best performance.
- Master Record Selection can't be survivorship rule or Data Quality Rules if the Merge Scope has been set to Customer data management specific areas with restrictions.
- The Duplicate Identification batch process identifies a preliminary master record, but the final determination of master record occurs within duplicate resolution processing per the Master Record Selection Setting. Select the Select master based on duplicate identification results option if you want to retain the master record selection from the duplicate identification results.

How can I identify contacts that are matched with contacts in LinkedIn?

Contacts that your organization matches with contacts in LinkedIn using the LinkedIn Sales Navigator include the value LINKEDIN in the Original System Reference for Party attribute. You can create a BI report using this attribute as a filter from the **Sales - CRM Contacts** subject area or from any other subject area with a Contacts folder (**Contact > Contact - Additional Attributes > Original System Reference for Party**)

You can also use a direct SQL to get the matched records:

```
Select ORIG_SYSTEM_REFERENCE,OWNER_TABLE_NAME,OWNER_TABLE_ID from fusion.hz_orig_sys_references
```

Where ORIG_SYSTEM='LINKEDIN' OWNER_TABLE_ID is the record ID, OWNER_TABLE_NAME is the main table where the record is located (for example: HZ_PARTIES for contacts and accounts, MOO_OPTY for opportunities, and so on).

How can I get a list of all the personal saved searches created by end-users in Sales?

You can create a BI report with the following SQL query to get the list. You can use the information about the personal searches salespeople create, to create additional saved searches for the sales organization.

This query lists all the custom saved searches created by the users:

```
select ss.saved_search_uuid, stl.localized_name, stl.language, ee.entity_name, ss.creation_date,
ss.created_by, ss.keywords, ss.query_json, ss.aggregations_json, ss.sort_json, ss.fields_json from
fusion.zca_es_saved_searches_b ss, fusion.zca_es_saved_searches_tl stl, fusion.zca_es_entities ee
where ss.created_by <> 'SEED_DATA_FROM_APPLICATION' and stl.saved_search_uuid=ss.saved_search_uuid and
ss.entity_uuid=ee.entity_uuid
```

How do I search in fields in the Details pages?

In Oracle Sales in the Redwood User Experience, the fields on the Details pages give you the same advanced search capabilities as the list pages. You can search using words in the name or using related information. Like list pages, you can select a saved search to restrict the search to just the items of interest to you.

1. Place your cursor in the field to see recent and frequently accessed items.

Here's a sample list of suggestions (callout 2) for the **Primary Contact** field (callout 1).

Primary Contact 1 ...			
Name	Primary Account: Name	Primary Phone: Phone Number	Primary Email: Email
Ray Conboy	Omega Technologies 2	+1 788454690 x123	ray.conboy.webconference@gmail.com
George White	Ovum Healthcare	+1 (650) 555-1212	gw65878@gmail.com
Alex Ross	Nova Software Spectrum	+1 (206) 695-1289	alex.ross@noreply.com

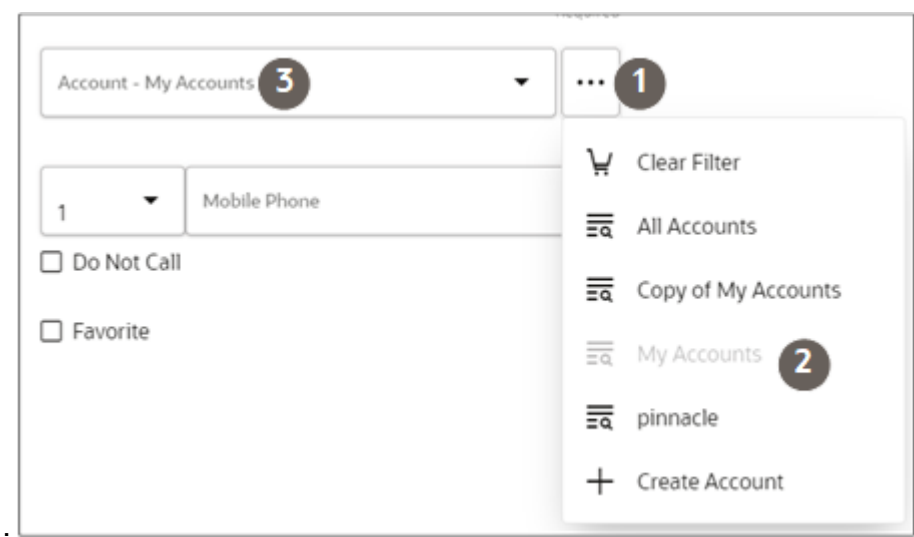
2. If the suggestions don't match what you're looking for, search using words in the name and related attributes. For example, if you're adding a contact to a lead or opportunity, you can search by contact name or by account name. Searching by the account name gets you a list of all of the contacts for account.

You can also search on a combination of terms. For example, you can enter the account name and the city where it's located. For example, a search on Pinnacle (the account name) and Seattle (the city), gets you Pinnacle Technologies in Seattle.

Account Pinnacle Seattle ...		
Name	Primary Address: Address	Primary Contact: Name
Pinnacle Technologies (SEATTLE, US)	600 4th Ave Rm 107, SEATTLE, WA 98104-1850	

3. You can narrow down the scope of your searches ahead of time by picking a saved search from the **Actions** menu (callout 1 in the screenshot).

For example, to search only accounts where you're on the team or territory, select the **My Accounts** saved search (callout 2). The saved search name appears as a filter in the field name (callout 3)



Tip: You may be able to search on attributes not displayed in the list of search results. For example, you may be able to search for accounts by the account owner although Owner isn't one of the columns in the results. Your application administrator can enable search on a large number of fields.

Which Attributes You Can Search

Here's a list of searchable attributes Oracle predefined for each create field.

• **Account:**

Page	Attributes You Can Search
All create pages where the Account field appears.	Account Name, Account Primary Address, Primary Contact Name

• **Contact**

Page	Attributes You Can Search
Create Account	Contact Name, Job Title
Create Appointment	Contact Name, Job Title, Primary Account Name
Create Lead	Contact Name, Job Title, Primary Account Name

Page	Attributes You Can Search
Create Opportunity	Contact Name, Job Title, Primary Account Name
Create Task	Account Name, Account Primary Address, Primary Contact Name

- **Lead**

Page	Attributes You Can Search
Create Appointment and Create Task pages	Lead Name, Account Name, Primary Contact: Name

- **Opportunity**

Page	Attributes You Can Search
Create Appointment and Create Task pages	Opportunity Name, Account Name

Search Partial Words, Exact Phrases, and Use Operators

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

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

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

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

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

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

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

- Use the OR operator to search on multiple terms.

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

- Use the NOT operator to narrow down your search.

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

When you use NOT followed by two or more words, you must enclose the words in double quotes (" "). For example, entering **Pinnacle NOT "Technologies Inc"** when searching for accounts, excludes Pinnacle Technologies Inc.

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

How do we display different products in the sales catalog in different business units?

You can display different sections of your sales catalog in different business units by using sales territories. You set up the sales territories for the business units with the business unit dimension and then filter the sales catalog using those territories as described in this topic. The filtering you set up doesn't depend on sales teams or assignment. As they browse products, salespeople see only the product groups in their business unit territories.

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.

Option	Description
Do not run	Territory filtering is off. The Filter by Territory check box doesn't display.
Enforce territory	Territory filtering is on, but is transparent to the user. The Filter by Territory check box doesn't 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**.

How can I avoid record lock error on accounts?

You might get a record lock error on accounts or contacts when you try to update it.

This happens because:

- There are parallel updates to the same record by another service request or UI.
- You're creating or updating relationship records for a contact in a batch pointing to same account record.
- You're creating or updating relationship records for an account in a batch pointing to same contact record.

When you create a new account or contact relationship, then the parent record gets updated along with the child record. This causes a record lock error on the parent. This happens more so when there is parallel record create or update using web services.

To avoid this issue, consider the following:

- When creating or updating relationships for a contact in a batch operation the same Account shouldn't be used.
- When creating or updating relationships for Accounts in a batch operation the same contact shouldn't be used.
- Parallel updates should be avoided to the same account or contact record by Service or UI flows.

To avoid Locks in such cases it's recommended to have a Retry mechanism in place.

How do I allow the update of sales contacts while protecting ERP contacts from being edited?

When you sync accounts and contacts from Financials to Sales, the ERP contacts can be edited in Sales just like sales contacts. The sales and ERP contacts are indistinguishable. To protect the ERP contacts from being edited, you must create a way to distinguish between the two types of contacts and then update security to allow editing only for the sales contacts.

For example, you can do the following:

1. Create a custom field on Application Composer that's set to a specific value when the contacts are created in Sales.
2. Remove contact edit access for all the sales job roles.
3. Use Access Management to add edit access to contacts that are flagged as sales contacts.

Related Topics

- [Can I sync my Financials accounts with Sales?](#)

How do I enable the creation of a lead from an account in Oracle CX Sales Mobile?

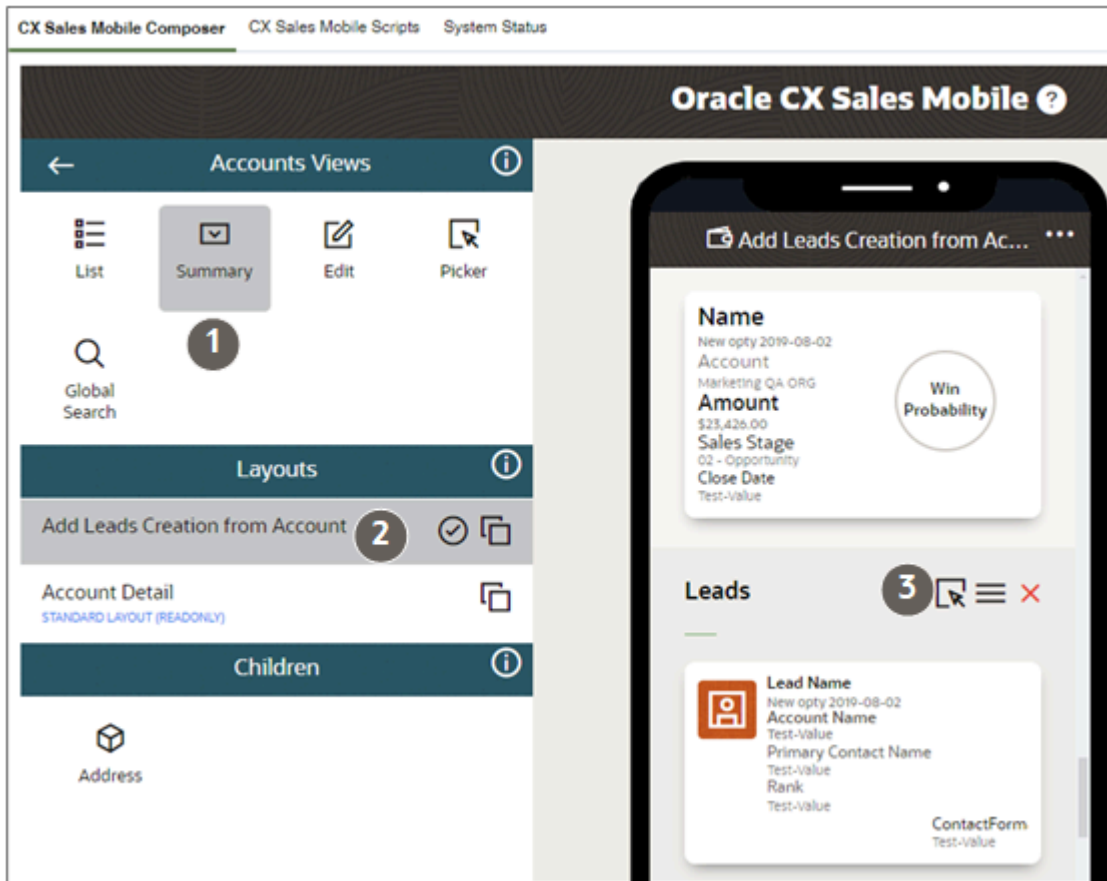
You can enable salespeople to create leads directly from an account record in Oracle CX Sales Mobile by using Mobile Application Setup in Application Composer. Here's how.

Add the Lead Creation Capability to the Account Layout

Here's a screenshot of the Account Summary view in the CX Sales Mobile Composer. The callouts highlight the steps to add the create lead action. Detailed steps follow.

Setup Summary and Screenshot

Callout	Description
1	With Account Views open, select the Summary view.
2	Duplicate the Account Detail layout.
3	In the screen mock-up, scroll down to the Leads card and click the square with arrow icon (that's the first icon from the left) and select the type of create lead action you want to enable.



1. Open Application Composer in a sandbox.
2. Click Mobile Application Setup.
3. In Application Features, click Accounts.
4. In Accounts Views, click Summary.
5. Click **Clone** (the two-squares icon) for the Account Detail standard layout.
6. Enter a name for your custom layout and click **OK**.
7. Select the layout you just created.
8. In the phone image layout screen scroll down to the Leads section.
9. Click the first icon at the top of the Leads card (a square with an arrow pointing into it) **Click to change relationship association with the target**.
10. In the dialog box, select one of the three options:
 - Create: salespeople can create new leads for the account.
 - Add: salespeople can add existing leads to the account.
 - Both: salespeople can both create and add existing leads.
 Click **OK**.

Test Your Configuration and Publish the Sandbox

1. After making your configurations, keep the Oracle CX Sales application open and make sure that the sandbox where you made the changes is active in the application.
2. Open CX Sales Mobile on your mobile device and sign in as the same user that you used to make your configurations. If you've already signed in to CX Sales Mobile, you need to force close the app and open it again.

This is because the app picks up the latest updates in the sandbox when you restart the app, or when you sign in.

3. Once you've restarted the app and signed in, your configurations are ready to view. The sandbox where you made your configurations is linked to your user details, and the configurations are automatically downloaded when you restart the app. However, you can double-check that you're in the correct sandbox by tapping **Settings** > **System** in the CX Sales Mobile menu and checking the **Sandbox Name** and the **Last Download Time**.
4. Check your configurations. If you've more than one pod and you want to check your configurations in another pod, then you need to connect to the other pod by changing the host URL. Navigate to **Settings** in the CX Sales Mobile app, tap **Reset Application**, and enter the host URL of the relevant pod.
5. If you make further updates in the sandbox, you need to force close the app, and sign in again to see the updates.
6. When you're happy with your configurations, publish the sandbox to distribute the configurations to your users.

How can I get user login history or application usage from Oracle Fusion Applications?

You have a few options for getting user sign-in and user usage information from Oracle Fusion Applications.

For more information about how to get user sign-on data and user usage in Oracle Fusion Applications, see the article on [My Oracle Support, Security Reports in Fusion Application \(Doc ID 2210883.1\)](#).

How do I get started with the Revenue Transformation Solution?

As revenue leaders look to modernize and compete, that often means pivoting to new business models or expanding to hybrid models that incorporate subscriptions, products, and services. Oracle Sales is powering this transition with end-to-end business flows that extend to the Oracle Fusion ERP Suite for orders, invoicing, payments, and revenue recognition, enabling organizations to effectively and efficiently transition from one-time selling to anything-as-a-service (XaaS) models.

Oracle's Revenue Transformation Solution enables you to connect business processes to reach your full revenue potential. Oracle's revenue transformation solution combines Oracle Sales, Oracle Configure, Price, and Quote (Oracle CPQ), Oracle Sales Performance Management, and Oracle Subscription Management – plus a host of Oracle's other revenue operations applications – to establish and accurately manage sales targets, sell any combination of products and services on a subscription basis, and provide global visibility into sales performance and revenue reporting.

The solution lets you price your product competitively, leveraging Oracle CPQ pricing capabilities in a single, unified administration flow, offering a streamlined user experience.

For more information about how you can implement a complete revenue transformation solution using key integrated features of several Oracle applications or modules, see the [How do I get started with the Revenue Transformation Solution?](#) solution playbook on the [Oracle Help Center Sales > Playbooks](#) page.

How do I configure contract approval notifications?

When a contract is sent for approval, all approvers receive a standardized workflow and email notification. You can now configure the notifications to meet your specific business needs and requirements through the Business Intelligence Publisher (BIP) .RTF-based contract approval notification template or subtemplate.

Note: This feature is controlled by opt-in. If you've opted in, the new BIP-based contract approval notification is sent during contract approval. If you decide not to opt-in, then you'll continue to see the current notification display. From Update 24D, the feature will be available by default.

For more information about how you can opt-in and make your changes to your contract approval notifications, see the [How do I configure contract approval notifications?](#) solution playbook on the [Oracle Help Center Sales > Playbooks](#) page.

How do I implement Microsoft 365 for Oracle Sales Redwood UX?

The Microsoft 365 Integration for Oracle Sales Redwood User Experience consists of the next-generation Microsoft Outlook add-in and sync capabilities.

The main benefits in this next-generation release are:

- **Task-Oriented Functionality and Insights:** The Redwood UX add-in, known as the Oracle Sales for Outlook add-in, features task-oriented functionality geared to salespeople's day-in-the-life scenarios, in the context of Outlook interactions and interface.

Salespeople begin their day with a daily briefing, right in the add-in. Insights from Sales further help them engage with their customers, easily schedule and prepare for meetings, and review and respond to emails.

- **Intuitive UIs Optimized for Microsoft Outlook:** The UI is optimized for Outlook, providing 360-degree sales information for meetings and emails, directly in the context of those meetings and emails.

Salespeople can share meetings and emails with Sales. Emails are shared as conversation messages.

- **Autosync Data Between Microsoft Exchange and Oracle Sales:** This next-generation integration supports bidirectional sync for appointments, tasks, and contacts, as well as the automatic sync of appointments from Exchange to Sales.

Appointments, tasks, and contacts can be synced from Sales to Exchange based on Workspace-defined saved searches. Emails can be shared by setting the Shared with Oracle category. Responses to shared emails can also be automatically captured from Outlook.

- **Daily Summary of Appointments:** In addition, salespeople see a daily summary of appointments that they can act on. A default Workspace saved search can be set for each object across the organization and salespeople can set their preferred saved searches for sync using the add-in.

- **Improved Sign-In Experience:** The add-in provides a better and more secure sign-in experience than the previous version. Based on your company's policy, the add-in uses OAuth, a feature that lets salespeople stay signed in for longer.
- **Easy Customization and Deployment:** The add-in comes with predefined layouts to use as-is, or if changes are required, the predefined layouts can be easily tailored using the new Oracle Sales for Outlook tool in Application Composer.
The tool makes it easy to migrate customizations from the earlier CX Sales for Microsoft 365 add-in or from the Oracle CX Sales Mobile application, so you don't need to manually rebuild the customizations for this integration.

For more information on how your organization can benefit from the Microsoft 365 Integration for Oracle Sales Redwood User Experience, see the solution playbook, [How do I implement Microsoft 365 for Oracle Sales Redwood UX?](#) on the [Oracle Help Center Sales > Playbooks](#) page.

Related Topics

- [What are the system requirements for Microsoft integration?](#)

How do I check which copy maps are used during lead conversion?

Copy maps are a declarative way to specify which fields are copied among objects. The functionality for converting a lead to an opportunity uses the predefined Copy Lead To Opportunity Map copy map feature. You can use predefined mapping files to specify which copy maps to use when converting leads.

For example, predefined mapping files are available as part of your sales application to enable you to map objects and attributes during the creation of an account or a contact when converting a lead to an opportunity. Specify the copy map name you want in one of these profile options:

- Use the **Direct Lead to Opportunity Mapping** profile option to specify the copy mapping file name created when a direct lead is converted to an opportunity.
- Use the **Partner Lead to Opportunity Mapping** profile option to specify the copy mapping file name created when a partner lead is converted to an opportunity.
- Use the **Lead to Account Mapping** profile option to specify the mapping file name created in Copy Maps. This file maps objects and attributes during the creation of an account when converting a lead to an opportunity.
- Use the **Lead to Contact Mapping** profile option to specify the mapping file name created in Copy Maps. This file maps objects and attributes during the creation of a contact when converting a lead to an opportunity.

Here's how to access the profile options to see what copy map is being used:

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Sales
 - Functional Area: Opportunities
 - Task: Manage Sales Lead Profile Options
2. In the Manage Sales Lead Profile Options page, enter the name of one of the mapping profile options you want in the **Profile Display Name** field. For example, search for the **Direct Lead to Opportunity Mapping** profile option.

3. Click **Search**.
4. In the Profile Values section, you can see the name of the mapping file used when the lead is converted to an opportunity.
5. Click **Close**.

What's the allowed attachment file type and size for sharing emails?

The allowed attachment file type and size limit when sharing emails or uploading files in the Accounts and Opportunities areas is:

- Images: JPEG, GIF, PICT, PNG, TIFF: 2 MB
- Microsoft files: PPT, DOC, EXCEL: 10MB
- Video: QT, MP4, .XMS: 10 MB
- Audio: M4A, MPEG3, AAC, .WAV: 2 MB

For uploading files from objects such as Account and Opportunity:

- Upload a file: 10 MB
- Upload contact or avatar image: 2MB

Note: If you've a locally-installed Microsoft Outlook application and the Microsoft Edge browser on a Windows computer, you can't use the Microsoft 365 add-in to download the attachments that have been uploaded to Sales records. You can download them from the Sales application.

Related Topics

- [Can I prevent users from deleting attachments?](#)

What effect does the Territory-Based Assignment Selective Update Enabled profile option have?

The Territory-Based Assignment Selective Update Enabled (MOO_TBA_SELECTIVE_UPDATE_ENABLED) profile option is used to update the opportunity time stamp during territory-based assignment if the Revenue Owner or Opportunity Owner assignment outcome has changed.

If disabled, this profile option will always update the opportunity time stamp during territory-based assignment. However, to reduce the performance overhead, the last assigned time stamp (date) isn't updated for any incoming territories where the time stamp is the same as already assigned territories.

How do I reprice and a generate billing schedule?

To reprice and generate a billing schedule, you need to:

1. Set GenerateBillingSchedule to Y in the Products file.
2. Set GenerateBillingSchedule to Y in the Subscription file.
3. Set reprice to Y in the Products file.
4. Re-import the Subscription.csv after this.

To activate your subscription, you need to re-import the Subscription.csv file after importing all required files.

Note: You can't reprice and generate a billing schedule when a subscription is in Active status.

How do I filter and search in lists of Contacts?

You can filter and search through the information on Contact records if the list pages include the Action Bar. Which attributes you can filter and search on depends on the information type.

Here are the steps to help filter and refine your contact search.

1. In the Action Bar, enter **filter** and select a filter. For example, on the All Contacts Page, you can filter on Name, Primary Email, Comments, and Contact Job Title.

Note: You can't filter on all of the common attributes, just on those listed. For example, you can't filter team resources by their role.

2. Select the operator.
3. Enter a search term in the **Value** field. You can enter only one keyword. Searches aren't case-sensitive and no operators are permitted.
4. Click **Apply**.
5. You can add additional filters.

Here's a screenshot of the Contacts page for an account with the Name filter applied, and Contains operator selected. Nelson is the search term entered in the Value field.

↑ My Accounts

Pinnacle Technologies: Contacts

Industry
Retail

Address
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☒ Contains

☐ Equals

☐ Starts With

☐ Ends With

Value
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Cancel

Apply

Primary Contact

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Blake PHILLIPS sendmail-test-discard@oracle.com No

How do I delegate activities to another user?

You can enable the ability for all sales users in your implementation to delegate their activities, such as delegating calendar appointments or tasks, to another user. To enable delegation, you set separate profile options for appointments and tasks.

When users delegate an activity, they're simply changing the owner of the activity. After an activity is delegated, both the original owner and the user who now owns the activity can edit or update the activity.

To enable activity delegation:

1. In Setup and Maintenance, go to:
 - Offering: Sales
 - Functional Area: Sales Foundation
 - Task: Manage Administrator Profile Values
2. Search for and set two profile options according to your business needs. This table lists the profile options:

Profile Option Display Name	Profile Option Code	Description and Setting
Appointment Delegation Enabled	ZMM_ACTIVITY_APPT_DELEGATION	Enables sales users to delegate appointments to other sales users. Set to Yes at site level to enable all users in the site to use the delegation feature.

Profile Option Display Name	Profile Option Code	Description and Setting
Task Delegation Enabled	ZMM_ACTIVITY_TASK_DELEGATION	Enables sales users to delegate tasks to other sales users. Set to Yes at site level to enable all users in the site to use the delegation feature.

3. Save your changes.

Disable Delegation

Turn off delegation if you no longer want the second owner to co-own the activity.

Why can't I search revenue line details from the Opportunity workspace area?

Opportunity revenue line information isn't available for Workspace search columns because an opportunity can have multiple revenue lines. However, if you've the Revenue Lines object enabled for Adaptive Search, then you can use the Revenue Lines workspace area to view the products and opportunities for each revenue line.

To view a list of opportunities having one specific product, you can add a filter on the **Revenues** field to search for corresponding records. When you create an opportunity, a primary revenue record is automatically created. The primary revenue record is independent of products added to an opportunity and is always associated with the opportunity even if no products are added to the opportunity. The primary revenue record displays as a summary line in the UI but no product related information such as item name or description values are displayed.

How can I enable Oracle Sales in the Redwood User Experience?

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

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

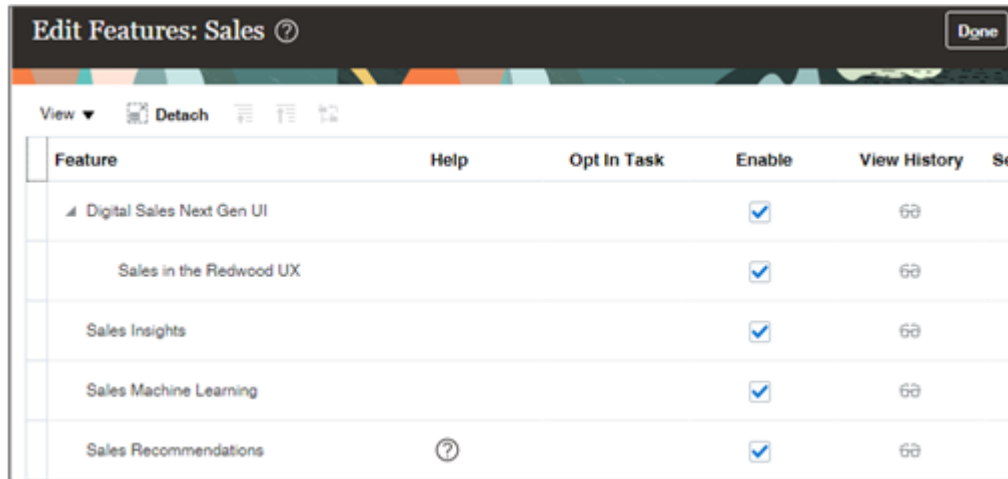
Here are the steps to enable Sales in the Redwood UX if you're an existing customer updating to the latest version:

Note: This procedure doesn't take care of the Oracle Spectra platform requirement. Contact your Oracle Support representative at the earliest convenience to get the Spectra platform enabled in your environment.

1. Sign in as a setup user and open the **Setup and Maintenance** work area.

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

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



Feature	Help	Opt In Task	Enable	View History	Select
Digital Sales Next Gen UI			☒	60	
Sales in the Redwood UX			☒	60	
Sales Insights			☒	60	
Sales Machine Learning			☒	60	
Sales Recommendations	?		☒	60	

5. Click **Done**.

What's the maximum number of values I can use for an Opportunity Rule-Based Assignment (RBA) rule condition?

The maximum number of values to use for a rule condition is 500 when creating rules for Opportunity Rule-Based Assignment (RBA).

How do I import notes?

This topic shows how to import notes using the Import Management feature. You can attach a note to an existing object record.

Types of Notes

Note can be one of the following types:

- GENERAL
- REFERENCE

- SPECIAL

A note with line break may not be imported with the correct formatting. To ensure you import the content with the line breaks, insert a
 instead of a line break in the note. Refer to *Notes Imported Does Not Show In Correct Format In UI* for more information.

Before You Start

Before importing the note, make sure to import the object record to attach the note. You can import an object, such as Sales Lead, using Import Management. See the topic Import Data for the details on importing. After the import completes, note the primary key and PUID of the record created using the success log file.

How You Import the Note

You're set to import the note and associate with the object record. Use the following steps to import notes using Import Management.

1. Click **Tools > Import Management**.
2. On the **Manage Imports** page, click the **Create Import Activity** button. On the **Enter Import Options** page, enter a name for your import. In the **Object** drop-down list select Note.
3. In the Note Object drop-down list that appears, select the object to associate with the note, such as Sales Lead.
4. Create the note CSV file in the following format.

ObjectPuid or SourceObjectId	NoteTxt	NoteTypeCode
CDRM_82807 or 300100181729328	A sample note text	SPECIAL

You must provide either ObjectPuid or SourceObjectId in the source file, but not both.

ObjectPuid - The public unique identifier of the object. In case of Sales Lead, this refers to the LeadNumber value.

SourceObjectId - The primary key of the object. For Sales Lead, this refers to the LeadID value.

NoteTxt - The note entry.

NoteTypeCode - The category of the note. The possible values are GENERAL, REFERENCE, and SPECIAL.

5. Browse the source CSV file and create the import activity.
6. Review the import activity configuration and click submit to activate the import. The Manage Imports page shows the status of the submitted import.

How do I prevent duplicate contacts from appearing in the Outlook add-on?

To keep the app from creating duplicating contacts in the integration with Microsoft using the Outlook add-on, you need to enable the setting that lets the sync process delete duplicates.

Allow Contact Deletion in the Redwood UX

Enable the setting, Allow Sync to Delete Oracle Sales Contacts, if you're using the Redwood User Experience (UX) version of the Microsoft Outlook add-on.

See [Configure Contacts Sync](#) for more information.

Note: Oracle recommends that you use the Redwood UX version of the Microsoft Outlook add in. See [Overview of Microsoft 365 for Redwood UX](#) to get started.

Allow Contact Deletion in the Classic Sales UX

If you're using the previous version, the Oracle CX Sales for Microsoft 365 add-on, then enable the setting, Allow Sync to Delete CX Contacts.

See [Manage Microsoft 365](#) for more information.

How do I set sync options in the previous version of the Microsoft Outlook add-in?

You must configure several settings that let the Microsoft 365 Sales for Outlook add-in run smoothly, such as sync options, default saved search, conflict resolution, and record sync limits.

Note: Oracle recommends that you use the Redwood User Experience (UX) version of the Microsoft Outlook add in, not the previous version. See [Overview of Microsoft 365 for Redwood UX](#) for more information.

Navigate to the Manage Microsoft 365 Page

Here's how to get to the Manage Microsoft 365 page, where you set the options for the previous version of the add-in:

1. Sign in as a setup user or as the sales administrator.
2. Navigate to:
 - o Offering: Sales
 - o Functional Area: Integrations
 - o Task: Manage Microsoft 365
3. You can find the settings in the Manage Microsoft 365 page.

Options You Can Set

This table describes the contacts, appointments, and tasks sync settings.

Settings Area	Setting Name	Description
Conflict Resolution	Default Conflict Resolution	• CX Server Wins: The records in the Sales application overwrite the records in Microsoft 365. • Outlook Client Wins: The records in Microsoft 365 overwrite the records in the Sales application. • User Selected: Users can select at runtime the way to resolve conflicts.
	Allow User to Override Default Conflict Resolution	Lets users view the conflict resolution options in the add-in and select the option they want.
Usage Tracking	Enable Add-in Usage Tracking	Lets you track the usage of the Microsoft 365 add-in by your users.
Synchronization Settings	Enable Application Permission	This setting enables standard sync to gain access to all the mailboxes so that users don't have to frequently sign in into the add-in.
	Enable Dynamic Batching for Sync	This setting auto-enables the sync engine to determine the optimized batch size for sync, based on the Oracle server capacity. This improves performance.
	Allow Users to Select Default Saved Search	Selecting this checkbox causes the default saved search defined in the Microsoft 365 Designer as the saved search for all the users. Custom saved searches specified by users in the add-in are ignored.
	Synchronization Tracking	This setting lets you monitor the sync statistics and displays the details in the Microsoft 365 Monitor.
	Include Attachments in Sync	This setting lets the sync engine share attachments on emails or appointments with Sales.
	Attachment Size Limit	The maximum size limit is 10 MB. You can configure according to your business needs. Files larger than the size you configured here won't be shared with Sales.
Contacts	Enable Sync	This is a primary setting to indicate you want to sync contacts. If this setting is disabled, other settings in this section are disabled, too.
	Allow Sync to Create CX Contacts	When a user shares new contacts from Outlook, new contact records are created in the sales application.
	Allow Sync to Delete CX Contacts	This setting means that when a user removes a contact in Outlook, the corresponding contact records are removed in Sales.
	Limit	Enter the number of records to be synced in every run of the sync process.
Appointments	Enable Sync	This is a primary setting to indicate you want to sync appointments. If this setting is disabled, other settings in this section are disabled, too.

Settings Area	Setting Name	Description
	Enable Bidirectional Sync	If set to a yes value, appointments are synced between Sales and Outlook. If you deselect it, the sync engine only syncs appointments from Outlook to Sales and not from Sales to Outlook.
	Allow Sync to Create CX Appointments	If set to a yes value, this setting means that when a user shares meetings from Outlook, appointment records are created in Sales.
	Allow Sync to Delete CX Appointments	If set to a yes value, when a user removes a meeting or an appointment from Outlook, the corresponding appointment record is removed from Sales.
	Autocapture Appointments	If set to a yes value, appointments are automatically synced without the need for the users to tag the appointments as Shared with Oracle.
	Capture Appointments with Empty Invitee List	This setting is available only when Auto-capture Appointments is selected. Select this setting to sync those appointments that don't have any invitees. Usually, salespeople create such appointments to block some time on their calendars to complete priority tasks.
	Include Private Appointments	Users' private appointments are synced during the auto-sync of appointments.
	Allow Invitees to Share Appointments	Allows salespeople to share the meetings they were invited to.
	Limit	Enter the number of records to be synced in every run of the sync process.
Tasks	Enable Sync	This is a primary setting to indicate you want to sync tasks. If this setting is disabled, other settings in this section are disabled too.
	Allow Sync to Create CX Tasks	When a user shares emails from Outlook, emails are saved as tasks in the sales application.
	Allow Sync to Delete CX Tasks	When a user deletes an email from Outlook, the corresponding task is removed from the sales application.
	Include Private Tasks from Outlook	Syncs the private tasks in Outlook with the sales application.
	Limit	Enter the number of records to be synced in every run of the sync process.
End User License Agreement Details	Agreement Acceptance	Shows the user who has accepted the terms and conditions mentioned in the user license agreement. Also shows the date and time when the user has accepted the agreement.
	View Agreement	Click the link to go through the agreement again.

How can I enable recurring revenue schedules for Oracle Sales?

Salespeople can use recurring revenue schedules to account for revenue against opportunity products or product groups that are part of subscription business models. If you're using the Redwood fragments version of Sales, then you can enable recurring revenue schedules using these instructions.

Note: This topic is applicable only if you're using the fragments version of Sales in the Redwood UX.

To enable recurring revenue schedules, you must complete these steps in Oracle Visual Builder Studio:

Steps to Enable Recurring Revenue Schedules

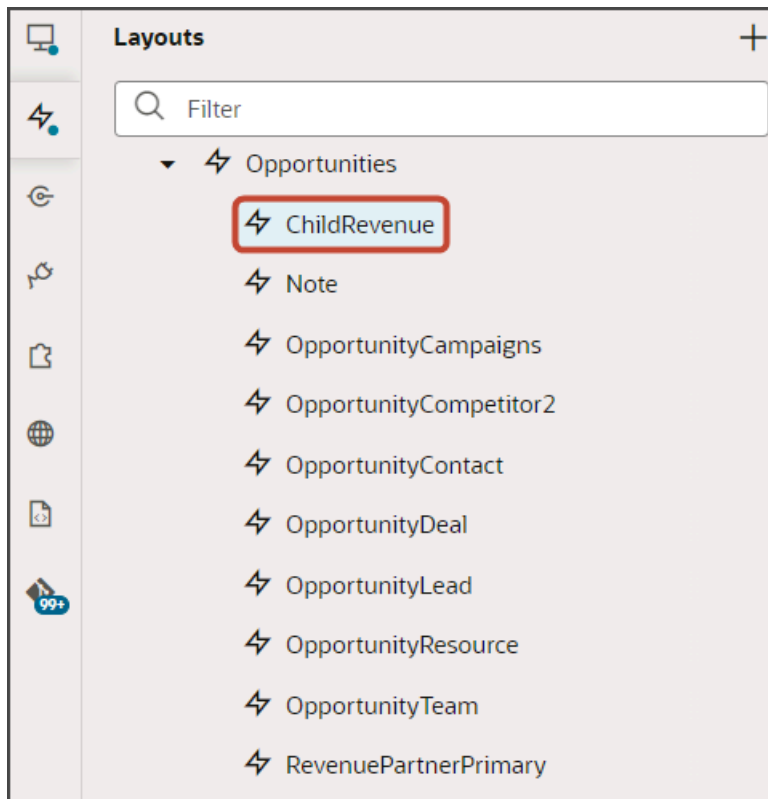
Setup Step	Context
1. Create a new event listener and action chain.	When you create an event listener, an action chain is automatically created, as well. Update the action chain to turn on the ability to create recurring revenue schedules.
2. Manually update the action chain name, if necessary.	This step is required only if the action chain name doesn't look like the value documented below.
3. If your extension is using a cloned layout for the Edit Layout rule set, then modify the path for the RevenueRecurrenceLayout section.	This step is required only for cloned layouts.

1. Create Event Listener and Action Chain

Add a new event listener for the **opportunitiesChildRevenueOnEditEvent** event.

1. In Visual Builder Studio, click the Layouts side tab.

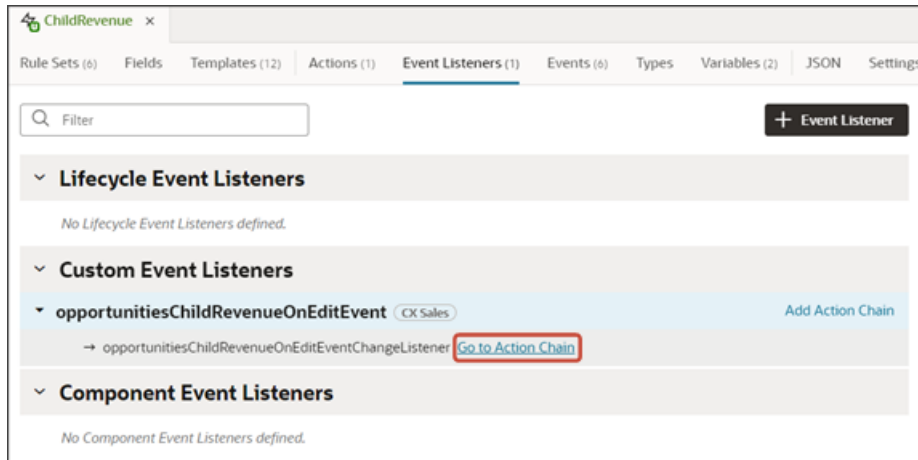
2. On the Layouts side tab, click the **CX Sales > Opportunities > ChildRevenue** node.



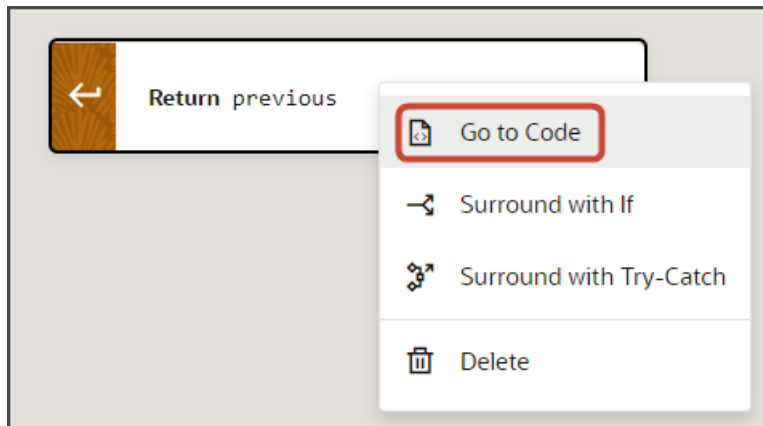
3. On the ChildRevenue tab, click the **Event Listeners** subtab.
4. Click **+ Event Listener**.
5. In the Create Event Listener dialog, click **opportunitiesChildRevenueOnEditEvent**.
6. Click **Next**.
7. Click the + icon next to **Action Chains**.
8. In the **New Action Chain** field, enter `opportunitiesChildRevenueOnEditEventChangeListener`.
9. Click **Finish**.

Next, update the action chain for the **opportunitiesChildRevenueOnEditEventChangeListener** event listener.

1. On the refreshed Event Listeners page, next to the new **opportunitiesChildRevenueOnEditEventChangeListener** event listener, click **Go to Action Chain**.



2. On the Actions subtab, right click the **Return previous** node and then click **Go to Code**.



3. In the code, the row for **return previous;** is highlighted.



Place your cursor at the end of the previous row and add this code snippet:

```

if (event.cartItem && Object.keys(event.cartItem).length === 0 && event?.row.SplitTypeCode !==
"PARENTSPLIT") {
    previous = {};
    previous.enableRecurrence = true;
}

```

}

```
class opportunitiesChildRevenueOnEditEventListener extends ActionChain {

    /**
     * @param {Object} context
     * @param {Object} params
     * @param {{row:any,child:object[],related:object[],cartItem:object,enableRecurrence:boolean}} params
     * @param {{row:object,parentRow:object,mode:string,cartItem:object}} params.event
     * @return {{row:any,child:object[],related:object[],cartItem:object,enableRecurrence:boolean}}
     */
    async run(context, { previous, event }) {
        const { $layout, $extension, $responsive, $user } = context;
        if (event.cartItem && Object.keys(event.cartItem).length === 0 && event?.row.SplitTypeCode !== "PARENT") {
            previous = {};
            previous.enableRecurrence = true;
        }
        return previous;
    }
}
```

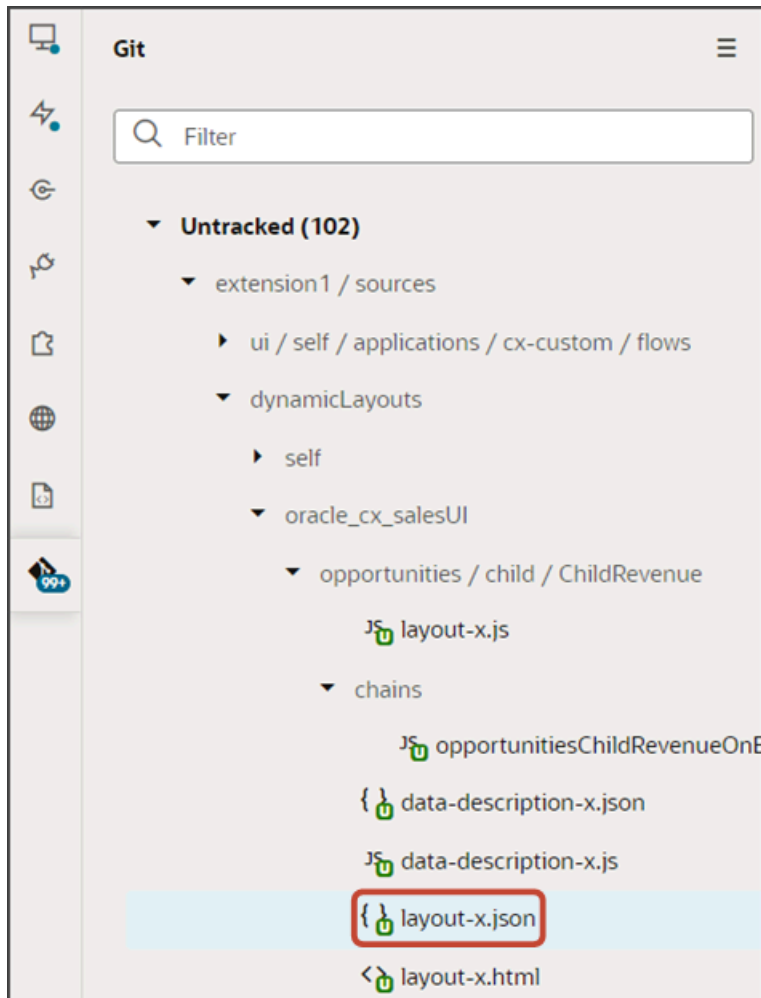
The previous code confirms the event that's called when the user edits an opportunity product, and also confirms that the revenue line being edited is not already a parent split line. If those things are true, then the ability to create recurring revenue schedules is set to true.

2. Update the Action Chain Name

In some instances, you might need to update the action chain name. Here's how:

1. In Visual Builder Studio, click the Git side tab.

2. Navigate **Untracked > extension1 / sources > dynamicLayouts > oracle_cx_salesUI > opportunities / child / ChildRevenue > chains > layout-x.json**.



3. In the layout-x.json file, scroll down to the **eventListeners** section and confirm that the action chain name looks as follows:

"chain": "opportunitiesChildRevenueOnEditEventChangeListener"



3. Modify the Path for the RevenueRecurrenceLayout Section (for Cloned Layouts Only)

If you're working with a cloned layout for the **Edit Layout** rule set, then review the JSON to confirm that the path for the recurring revenue schedule section is correct.

1. Still on the ChildRevenue tab, click the JSON subtab.
2. Scroll down to the **displayProperties** in the **EditLayout** section.
3. In the **displayProperties** section, review the **RevenueRecurrenceLayout** line.



4. Add a "/" just before **RevenueRecurrenceLayout** so that the code looks like this:

```
"{{ $variables.isShowRevenueRecurrenceFields ? {"RevenueRecurrence\" : \"RevenueRecurrenceLayout\"} : null }}"
```

Test the Flow

You can now test the flow to confirm that users can configure recurring revenue schedules for an opportunity.

1. In Visual Builder Studio, click the App UIs side tab.
2. Navigate **CX Sales > cx-sales > opportunities > opportunities-list**.
3. From the opportunities-list page, click the Preview button to see your changes in your runtime test environment.



4. The resulting preview link will be:

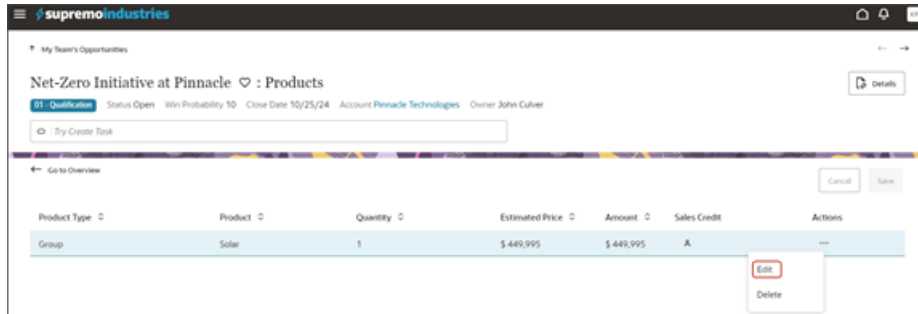
```
https://<servername>/fscmUI/redwood/cx-sales/opportunities/opportunities-list
```

5. Change the preview link as follows:

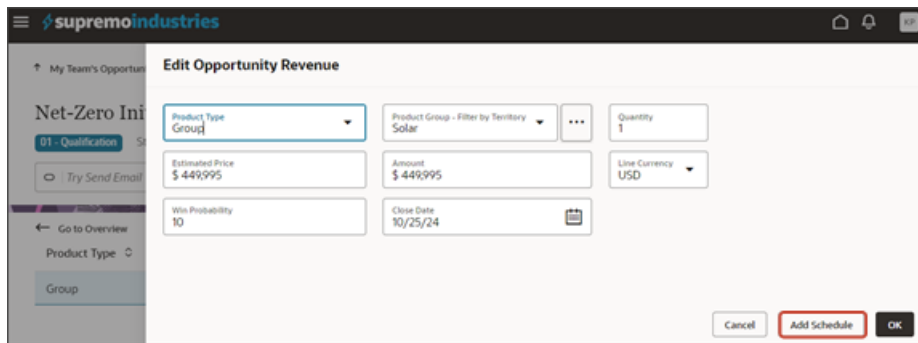
```
https://<servername>/fscmUI/redwood/cx-sales/application/container/opportunities/opportunities-list
```

Note: You must add `/application/container` to the preview link.

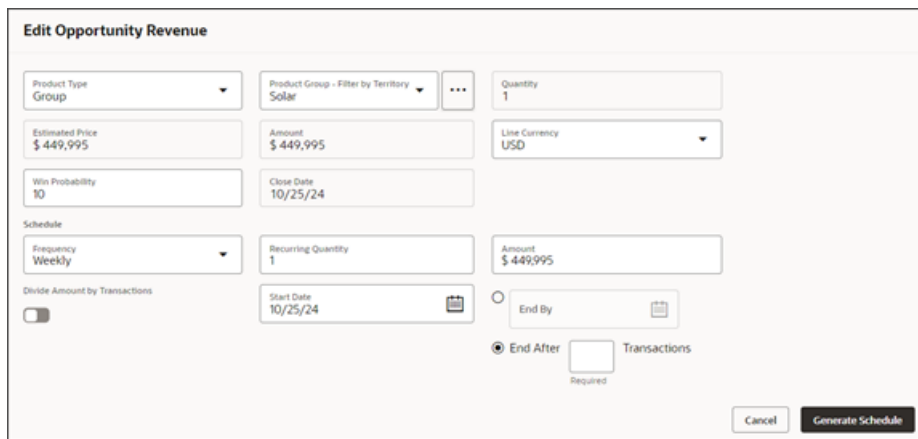
6. On the Opportunities list page, click any opportunity to edit.
7. On the Opportunity detail page, click the **View All Products** link that displays on the Products panel.
8. Click a product that you want to configure a recurring revenue schedule for, and then from the Actions menu, click **Edit**.



9. In the Edit Opportunity Revenue drawer, click the **Add Schedule** button.

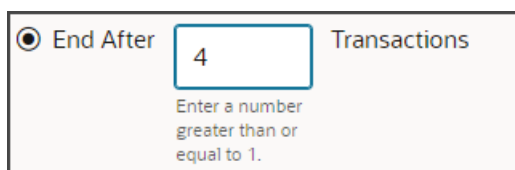


10. In the Schedule region that displays, you can now configure a recurring revenue schedule.



11. Add the schedule details.

For example, in the **End After < > Transactions** field, enter a number such as 4.



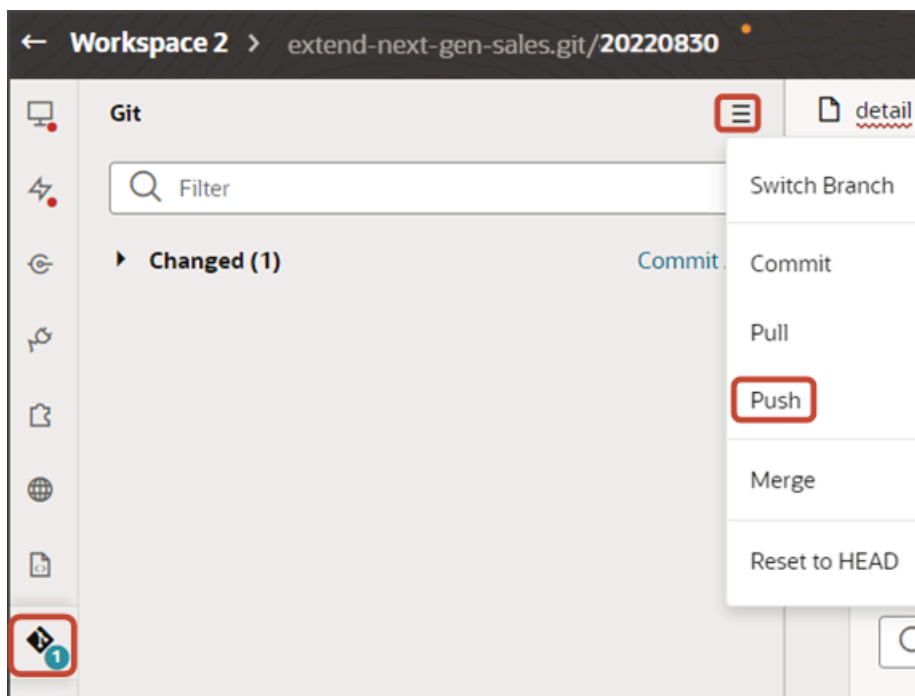
12. Click **Generate Schedule**.

Note the schedule is created.

Schedule			
Edit Schedule Delete Schedule Add Schedule			
Close Date ↕	Quantity ↕	Total Amount ↕	Actions
11/15/24	1	\$ 449,995	...
11/8/24	1	\$ 449,995	...
11/1/24	1	\$ 449,995	...
10/25/24	1	\$ 449,995	...

13. Save your work by using the Push Git command.

Navigate to the Git tab, review your changes, and do a Git push (which does both a commit and a push to the Git repository).



Why does my Workspace record query return fewer results than the record count in my reports?

By design, Workspace record queries return only records that were updated within the last 365 days. Workspace transactional data for several objects are marked with a "Last Update Date" stamp that restricts the search to only 1 year. Any record that hasn't been updated for more than a year won't appear in the Workspace search results.

Other methods of reporting updated records outside of Workspace doesn't have this restriction, hence the reason for differences in the record count. Here's a list of the Workspace transactional objects:

- Activities
- Leads
- Opportunities
- Quotes and Orders
- Service Requests

Note: Workspace transactional object details are updated asynchronously during Near Real-time Indexing. The asynchronous update happens after the objects in the above list are refreshed.

How do I filter records by creation date and time in Workspace?

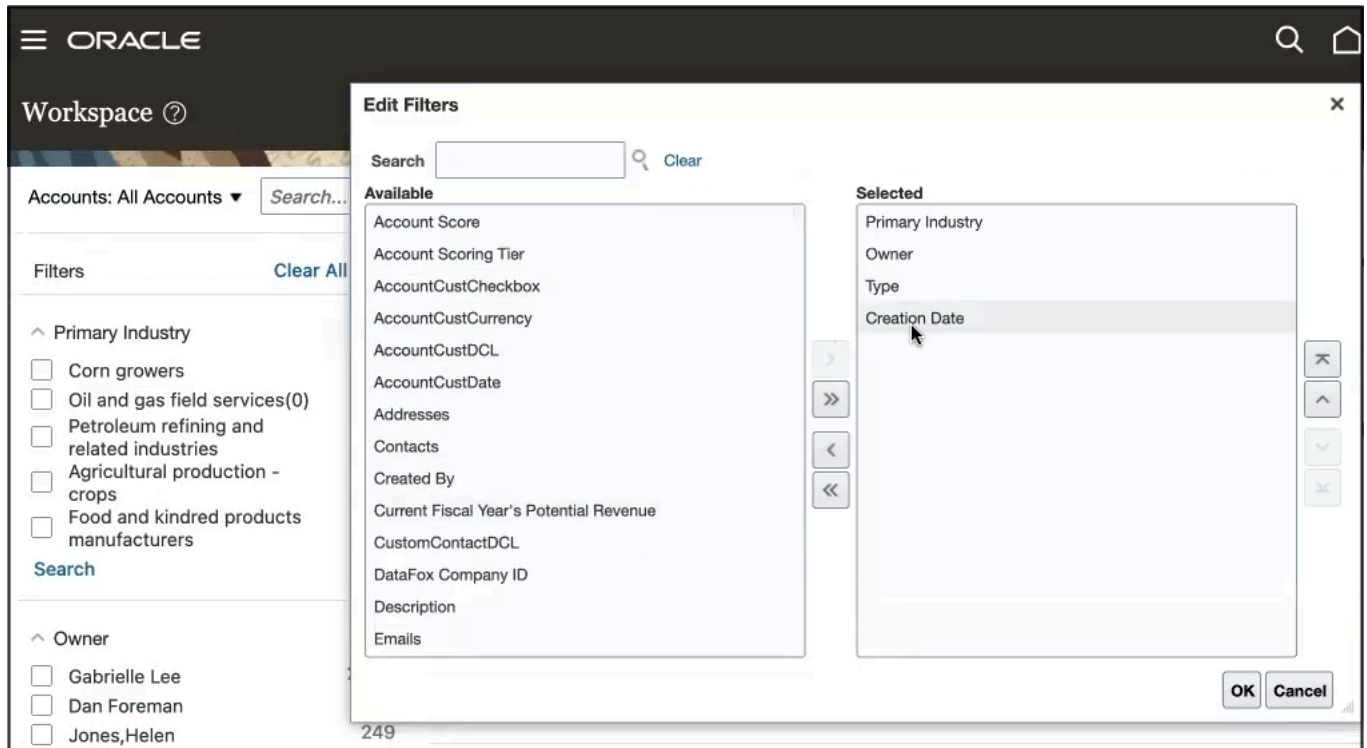
You can select the creation date and time to filter by a specific date to narrow down your object list of search results in Workspace. This saves you time because you can conduct more focused searches.

For example, you can add the Creation Date field as an object search filter and specify a specific time filter as part of your date search filter to help further refine your list of returned records in Workspace or work areas powered by Adaptive Search.

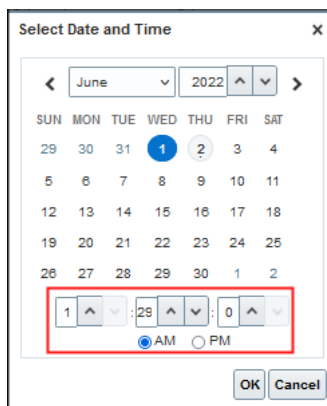
Follow these steps to filter account records by date and time.

1. From Workspace or a work area powered by Adaptive Search, select the object you want to search such as Accounts.

- Click **Show Filters** and select **Creation Date** from the list of available filters and move it to the selected pane as shown.



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



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

The screenshot shows the 'Workspace' interface with a search bar at the top. Below the search bar, there are filters for 'Creation Date' and 'Primary Industry'. The 'Creation Date' filter is set to 'Between' with dates '6/1/22 1:29 AM' and '6/2/22 1:28 AM'. The 'Primary Industry' filter is set to 'Automotive' with a count of 1. The search results table shows several accounts, including 'Pinnacle Hier LcENax (Redwood Shores, US)', 'Pinnacle Hier edoulw (Redwood Shores, US)', 'Pinnacle Tech mWhbkH (Redwood Shores, US)', 'Pinnacle Tech ANXBn (Redwood Shores, US)', 'TestCreateAccount1654095397446', and 'Pinnacle Tech EBPmXk (Redwood Shores, US)'. The table columns are 'Name', 'Primary Address', and 'Primary Contact'.

Name	Primary Address	Primary Contact
Pinnacle Hier LcENax (Redwood Shores, US)	500 Oracle Parkway, REDWOOD SHORES, CA 94065	SecondContactngPLRVJ SecondL...
Pinnacle Hier edoulw (Redwood Shores, US)	500 Oracle Parkway, REDWOOD SHORES, CA 94065	GabrielFNDqEQEdUvNOq Boshks...
Pinnacle Tech mWhbkH (Redwood Shores, US)	500 Oracle Parkway, REDWOOD SHORES, CA 94065	
Pinnacle Tech ANXBn (Redwood Shores, US)	500 Oracle Parkway, REDWOOD SHORES, CA 94065	
TestCreateAccount1654095397446		
Pinnacle Tech EBPmXk (Redwood Shores, US)	500 Oracle Parkway, REDWOOD SHORES, CA 94065	

How do I use the legacy Sales documentation?

Use the legacy guides to learn how to set up core sales functionality, which remains the same in all Sales versions.

- Implementing Sales:** Use this guide to set up users and core sales features, including accounts, competitors, leads, opportunities, and sales territories. The core sales features are the same in all the sales versions and use the same setup tasks and pages.
Be aware that the guide covers the setup of features in classic Sales that are still supported, but have been replaced with newer features. For example, task templates and Sales Coach have been replaced by the Orchestration feature in Sales in the Redwood User Experience.
- Using Sales in the Redwood User Experience:** provides an introduction to the Redwood UX. While many features have been added and others enhanced, the guide still provides a useful starting point. For users, there's little difference between Next Gen Sales (Digital Sales) and the new fragments technology which underlies the latest Sales UX.
- Extending Digital Sales (Next Gen Sales) 23D:** Use this guide to learn how to extend and configure features in Next Gen Sales, the older version of Sales in the Redwood user experience. This guide is available only on our secure site.
If you're on the latest fragments version of Sales, then instead refer to the [playbooks on the Oracle Help Center](#).

How do I enable business objects for Adaptive Search?

Enabling a business object builds a search index and makes the object available for Sales in the Redwood User Experience, Workspace, and other work areas powered by Adaptive Search. It also makes the object available for Global Search, REST web services, and Workspace infolets.

Here's how to enable business objects for Adaptive Search.

- In the Setup and Maintenance work area, open the **Configure Adaptive Search** task:

- Offering: Sales
- Functional Area: Sales Foundation
- Show: All Tasks
- Task: Configure Adaptive Search

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

2. On the Configure Adaptive Search page, click the **Setup** tab.
3. On the Setup tab, **Quick** subtab, select the objects you want to enable for Adaptive Search:

Enabling an object enables any custom child objects and any custom fields you created. Not all the objects are sales objects. Partner and Partner Contact are only pertinent for Partner Relationship Management. HR Help Desk Request, Internal Service Request, and Service Request are specific to Fusion Service. The Case, HR Help Desk Request, Installed Base Asset, Internal Service Request, Product, Product Group, and Work Order objects can be enabled for REST web services only.

Note: Making the selection on the **Quick** tab enables the default search configuration. Use the **Advanced** tab to change search behavior and to enable custom objects. Custom objects created under Enterprise Resource Planning (ERP) and Supply Chain & Manufacturing (SCM) application suites aren't supported by Adaptive Search.

4. By default, the objects you enable on the Quick subtab are enabled in all the UIs that use Adaptive Search as well. You can disable objects from appearing in those UIs using the **Configure UI** and **Configure Global Search** tabs, but keep them available for REST web services.
5. Click **Publish**.

Your action runs an indexing process and an hourly index refresh for the objects you selected. You can monitor the progress of the indexing process on the **Monitor** tab. The process can take several minutes to complete, depending on your data volume.

Note: You can choose to publish only those objects for which you've changed the configuration. This avoids having to perform a full publish every time a configuration change is done, thus saving a lot of time.

6. Click the **Monitor** tab and **Publish** subtab to monitor the process. If the process completes with errors, contact your help desk.

Related Topics

- [How do I monitor Adaptive Search background processes?](#)

How do I remove an icon from the home page for a particular job role?

You can remove an icon from the home page and the Navigator for a specific job role by editing its EL Expression in the Structure tool. For example, you can use this method to remove the Analytics icon that was added in release 23D to Sales in the classic user experience.

Here's how you can configure what shows up in the Navigator and Home page with suggestions on the different EL Expressions you can use to hide items.

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	<pre>#{securityContext.userInRole['<Role_Name>']}</pre> <pre>#{securityContext.userInRole['ORA_FND_APPLICATION_ADMINISTRATOR_JOB,ORA_PER_EMPLOYEE_ABSTRACT']}</pre>
Only users not having any of the specific roles	<pre>#{!(securityContext.userInRole['<Role_Name>']}</pre> <pre>#{!(securityContext.userInRole['ORA_FND_APPLICATION_ADMINISTRATOR_JOB,ORA_PER_EMPLOYEE_ABSTRACT'])}</pre>
Only users having all of the specific roles	<pre>#{securityContext.userInAllRoles['<Role_Name>']}</pre> <pre>#{securityContext.userInAllRoles['ORA_FND_APPLICATION_ADMINISTRATOR_JOB,ORA_PER_EMPLOYEE_ABSTRACT']}</pre>

Who can see the group or page entry	EL Expression and Example
Only users not having all of the specific roles	<pre>#{!(securityContext.userInAllRoles['<Role_Name>'])} #{!(securityContext.userInAllRoles['ORA_FND_APPLICATION_ ADMINISTRATOR_JOB,ORA_PER_EMPLOYEE_ABSTRACT'])}</pre>
Only users having access to specific resources, for example, the Social work area	<pre>#{securityContext.userGrantedResource['resourceType=FNDResourceType;resource Launch_Social_Menu;action=launch']}</pre>

- 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.

How do I get a list of inactive contacts with no activities in OTBI so I can delete them?

You can create the list of contacts in an inactive status with no associated activities using the following SQL query in Oracle Transactional Business Intelligence (OTBI). You can then use the party IDs in the list to delete the inactive

contacts using Import Management. Import Management doesn't permanently purge the data. To purge the contacts, you must use the Manage Party Purge Activities task in the Setup and Maintenance work area.

Here's the sample SQL query to get a list of contacts in the Inactive status that don't have any activities associated with them:

```
SELECT
0 s_0,
"Sales - CRM Contacts"."Contact"."Contact Row ID" s_1,
"Sales - CRM Contacts"."Contact"."First Name" s_2,
"Sales - CRM Contacts"."Contact"."Full Name" s_3,
"Sales - CRM Contacts"."Contact"."Last Name" s_4,
"Sales - CRM Contacts"."Contact"."Sales Profile Status" s_5,
"Sales - CRM Contacts"."Contact Fact"."# of Contacts" s_6,
"Sales - CRM Sales Activity"."Activity Facts"."# of Activities" s_7
FROM "Sales - CRM Contacts"
WHERE
(("Sales - CRM Sales Activity"."Activity Facts"."# of Activities" = 0) AND ("Contact"."Sales Profile Status"
= 'INACTIVE'))
ORDER BY 5 ASC NULLS LAST, 6 ASC NULLS LAST, 2 ASC NULLS LAST, 3 ASC NULLS LAST, 4 ASC NULLS LAST
FETCH FIRST 75001 ROWS ONLY
```

How come I don't see a custom field in the list landing page?

For a custom field to be available in landing pages and searches, you must enable it in Adaptive Search and make sure you've run the Publish process.

To make a field searchable in work areas powered by Adaptive Search, including Sales in the Redwood user experience, you must complete these steps using the **Configure Adaptive Search** task in the Setup and Maintenance work area.:

1. You must make the field searchable for its business object.
2. Optionally, you can enable the field for search of a related object.
3. You must publish your configuration.

For detailed steps, see [How do I make a field searchable in the UI?](#).

How can I map lead qualification assessment data to custom fields for my lead using Groovy?

Lead assessment templates enable consistent and predictable assessment for all leads in your sales organization. You can create a Groovy script to include a Before Insert and a Before Update trigger on the Assessment object to map qualification assessment data such as question responses, response ratings, or score and so on to custom fields in your Leads detail page.

The lead qualification templates use the Assessment object and include assessment questions that represent industry best practices, sales methodologies, or a combination of both. Here's a sample of Groovy code that you can include in the assessment object to map the lead assessment data to your custom leads

Note:

You'll need to replace the **Custom_Lead_field_c** and **AssessmentQuestionField_c** attribute values with values of your specific custom fields.

```
***** Update Assessment and Lead Data *****

if(RelatedObjTypeCode == 'LEAD'){

def vo = newView('Lead')

def vc = vo.createViewCriteria()

def vcr = vc.createRow()

def vcitem = vcr.ensureCriteriaItem('LeadId')

vcitem.setOperator('=')

vcitem.setValue(AssessedObjectId)

vc.insertRow(vcr)

vo.appendViewCriteria(vc)

vo.executeQuery()

if(vo.hasNext()){

def curRow = vo.next();

curRow.setAttribute('Custom_Lead_field_c',AssessmentQuestionField_c);

}

}
```

How come I don't see all of the recurring appointments in my Sales application when I create them?

Recurring activities require the Periodic Refresh process to run before they show up. This Adaptive Search indexing process is set to run every hour, so you see only the initial appointment when you create it. You may have to wait some time before seeing all of the scheduled appointments in Sales and in CX Sales Mobile.

You can find out when the process runs by checking the Monitor Periodic Refresh tab in the **Configure Adaptive Search** setup task in Setup and Maintenance work area:

- Offering: Sales
- Functional Area: Sales Foundation
- Show: All Tasks
- Task: Configure Adaptive Search

If desired, you can change the process schedule.

How can I email whole dashboards rather than individual pages in OTBI Agent?

Create a new agent in Oracle Transactional Business Intelligence (OTBI), point to your dashboard, and select any page. After you select a dashboard page, the **Entire Dashboard** check box appears. By selecting this check box, you can schedule the delivery of entire dashboards. The email includes one Microsoft Excel file with tabs for each dashboard page.

How do I capture a .har file?

You can capture a .har file for troubleshooting an Oracle Redwood session. It's recommended that you use either the Firefox or the Chrome browser.

Before you start, make sure that only one browser window is open.

See these sections for steps and videos:

- [Capture a .har File in the Firefox Browser](#)
- [Capture a .har File in the Chrome Browser](#)

Capture a .har File in the Firefox Browser

Here's what you need to do:

1. Navigate to the UI page where you want to record the .har file.
2. Enable the developer tools by navigating to **More tools** > **Web Developer Tools**.
3. On the console, click the **Network** tab.
4. Click the settings icon and make sure the **Persist Log** option is selected.
5. Click the trash can icon to clear all existing logs shown on the console.
6. Select the activity that you need the .har file for.
7. Click **Settings** > **Save All as HAR**.

 [Watch video](#)

Capture a .har File in the Chrome Browser

Here's what you need to do:

1. Navigate to the UI page where you want to record the .har file.
2. Enable the developer tools by navigating to **More tools** > **Developer Tools**.
3. On the console, click the **Network** tab.
4. Click the settings icon and make sure the **Preserve Log** option is selected.
5. Click the cancel icon to clear all existing logs shown on the console.

6. Select the activity that you need the .har file for.
7. Click the download icon to export the .har file.



How do I set up the Application Usage Insights dashboard?

Use the Application Usage Insights dashboard to view application usage details.

To enable the Application Usage Insights dashboard, you need to ensure that the time zone, calendar, and resource hierarchy are active. You also have to create the relevant roles and run the required scheduled processes.

See these sections for steps and videos:

- [Time Zone, Calendar, and Resource Hierarchy](#)
- [Access and Roles](#)
- [Application Usage Insights Dashboard](#)

Time Zone, Calendar, and Resource Hierarchy

To view the insights, the site-level calendar should be active, the time zone must be in sync, and the resource directory enabled.

To check the calendar status:

1. Navigate to **Setup and Maintenance**.
2. In **Sales**, search and select for the **Manage Calendar Profile Options** task.
3. Note the active calendar profile value, for example `oracle_Cal`.
4. Go back to **Setup and Maintenance**.
5. In **Sales**, search for and select the **Manage Accounting Calendars** task.
6. Search for the active calendar, for example, `Oracle_Cal`.
7. Check whether the start date and the end date are up-to-date. If not, add years as needed.
8. Click **Save and Close**.

To check the time zone sync status:

1. Navigate to **Navigator > Tools > Set Preferences**.
2. Click **Regional** under General Preferences.
3. Note the **Time Zone**.
4. Navigate to **Navigator > Tools > Reports and Analytics**.
5. Click **Browse Catalog**.
6. Select **Profile > My Account**.
7. Confirm that the report time zone matches the previously noted time zone both in **Publisher Preferences** and general **Preferences**. If they are not in sync, select the right time zone in **Publisher Preferences**.
8. Navigate to **Navigator > Tools > Scheduled Processes**.
9. Click **Schedule New Process** and search for and select **Refresh Denormalized Time Dimension Table for BI**.

10. Click **OK** to sync your time zones.

To enable the resource directory:

1. Navigate to **Navigator > Others > Resource Directory**.
2. If the hierarchy is incorrect, navigate to **Resource directory**, select **Organization Hierarchies**, and then search for **Internal Research Organization Hierarchy**.
3. Click **Edit icon > Actions > Edit this hierarchy version**. Edit the resource hierarchy as needed.
4. Click **Done**.
5. The **Reporting Hierarchy Generation** process will be scheduled automatically. You can view its status at **Navigator > Tools > Scheduled Processes**.



Access and Roles

To access the Application Usage Insights dashboard, first you must check whether the **User track activity** and the **Click History** are enabled. Then you must add relevant roles and set the scheduled process parameters.

To check whether **User track activity** and **Click History** are enabled:

1. Navigate to **Setup and Maintenance**.
2. In **Sales**, search for and select the **Manage Administrator Profile Values** task.
3. Search for **User Session Activity Tracked** and make sure the **Profile Value** is **ENABLED**.
4. Search for **Disable Click History Features** and make sure the **Profile Value** is **No**.

To add relevant roles:

1. Navigate to **Navigator > Tools > Security Console**.
2. Enter the **Role Code**.
3. Click the **Role Category** drop-down list and select **Common Job Roles**.
4. Click **Next**.
5. To create an administrator role with four different function security policies, iterate the steps 6 to 8 for these function security policies:
 - View Organization Data in Application Usage Insights UI (only for users with administrative privileges)
 - Manage Custom Objects in Application Usage Insights (only for users with administrative privileges)
 - View Application Usage Insights UI
 - Run Populate Click Description Process
6. Click **Add Function Security Policy**.
7. Search for and select the relevant roles mentioned in step 5.
8. Click **Add Privilege to Role**.
9. To access the User Adoption and Click History subject areas, in the **Role Hierarchy** section, search for and add **User System Usage Transaction Analysis Duty**.
10. Click **Add Role Membership**.
11. Navigate to **Users section** and click **Add User**.
12. Search for the user and click **Add User to Role**.
13. To check the Role status, navigate to **Navigator > Tools > Security Console** and click the **Administration** tab.

To run the relevant scheduled processes:

1. Navigate to **Navigator > Tools > Scheduled Processes**.
2. Click **Schedule New Process**.

3. Search for **Click History Data Purge Process**.
4. Click **OK**.
5. Click **Advanced**.
6. Select **Using a Schedule**.
7. Enter the start date.
8. Click **Submit**.

Now you've completed all the prerequisites to enable Application Usage Insights.



Application Usage Insights Dashboard

You can use the Application Usage Insights Dashboard to see page views and application usage. The **Page Views** tab lets you view insights based on the number of sign-ins and the session duration. You can filter these insights by Duration, Team Member Names, Roles, and Managers.

Using the Enterprise Visibility filter, you can see enterprise-wide insights. User insights are ranked in a top 30 list based on clicks and time spent on the page.

In the **Application Usage** tab, you can view the insights specific to objects such as Activities, Opportunities, and more. Using the My Organization Visibility filter, you can also export the insights.



How do I import competitor data?

You can use Import Management to create or update Competitor records.

To import Competitor records, perform the following tasks:

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

How You Map Your Source Data to Object Attributes

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

You must do some basic checks before starting your import. For example:

- Complete all the prerequisites for importing each attribute in your source data.
- Have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.

If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier attributes with "ID" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Competitor object, the attributes are Party Id and Registry Id.

Required Attributes and Validations for the Competitor Object

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

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Competitor Record	Updating an Existing Competitor Record
Organization Name	Competitor Name - The name that identifies the competitor object	Not Applicable	Required	Conditionally Required
Name	Competitor Name - The name that identifies the competitor object	Not Applicable	Conditionally Required	Conditionally Required
Party Type	Competitor Party Type - Type of party record	Not Applicable	Conditionally Required The default value is ORGANIZATION.	Do not provide a value.
Party ID	PartyId -The unique ID for the existing competitor record.	A list of all party IDs is obtained by exporting the Competitor object.	Do not provide a value.	Required
Registry ID	Registry ID (PartyNumber) - The public unique identifier of the Competitor.	Not Applicable	Do not provide a value.	Conditionally Required

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

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

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

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

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)

How do I import opportunity competitor data?

You can use the Import Management to create, update, or delete opportunity competitor records.

You can import opportunity competitor records using these steps:

1. Map your source opportunity competitor data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the opportunity competitor data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

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

You must do the following before creating the .csv file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .csv file for a successful import

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- Public unique identifiers: If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- Source system and source system reference: Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new opportunity competitors or are updating opportunity competitors that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Opportunity Competitor Object

To import data successfully into Oracle Applications Cloud, your .csv file must include the required attributes. Ensure that you provide valid values for the attributes.

This table lists the required attributes for opportunity competitor records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating an Opportunity Competitor Record	Updating an Existing Opportunity Competitor Record	Deleting an Existing Opportunity Competitor Record
OptyCompetitorId	The unique identifier for Competitors of the Opportunity, that's generated by the application.	Not Applicable	Do not provide	Conditionally Required	Conditionally Required
OptyId	The unique ID for the existing opportunity record in the destination table.	You can obtain the OptyID for an existing opportunity by exporting the Opportunity object by navigating to the following in the Setup and Maintenance work area: - Offering: Sales - Functional Area: Data Import and Export - Task: Schedule Export Processes	Conditionally Required Either OptyId or OptyNumber is required.	Conditionally Required	Conditionally Required
OptyNumber	The public unique identifier of the opportunity.	Not applicable.	Conditionally Required Either OptyId or OptyNumber is required.	Conditionally Required	Conditionally Required
CmptPartyId	The party identifier with competitor party usage.	Not applicable	Required	Do not provide.	Do not provide

Go to **Navigator > Tools > Import Management > Import Objects**, to see all the attributes of the opportunity competitor object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

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

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

Related Topics

- [How do I import data?](#)
- [How do I update existing setup data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [How You Use Alternate Keys to Import Records](#)

Can sales administrators view all of the reports created by others in the Reports and Analytics catalog?

No. Sales administrators can only view the reports in the Shared folder. They can't view the reports in My Folders of other users.

What's the impact of increasing the frequency of the Periodic Refresh process for Adaptive Search in Sales?

The Periodic Refresh indexing process is set to run every hour. You can increase the frequency without impacting performance. However, how frequently you can run the process depends on the volume of your data. If you run the

process every 5 minutes, for example, and it takes the process more than 5 minutes to process the new records, the process will prevent the next one from running.

Related Topics

- [How do I monitor Adaptive Search background processes?](#)

How do I back up and restore analyses and reports in the OTBI catalog?

As a best practice, you should back up (archive) the entire Oracle Transactional Business Intelligence (OTBI) catalog. When you do, you can easily restore any folder someone deleted by accident and you can move your content to other environments. For details, see the topic [About Backing Up and Restoring Content](#).

Can I apply mass updates to retire multiple sales leads at once?

No, it isn't possible to retire multiple sales leads at once using the mass update smart action. The Retire action can't be enabled as a smart action because it uses a method-type action that isn't supported in batch operations.

See [How can I act on multiple records at the same time?](#) for more information about the actions you can apply using mass updates.

Related Topics

- [Can I apply mass updates to retire multiple sales leads at once?](#)

How can I access data from the row picked in the picker?

To obtain the record name and ID from `event.pickedRowsData`, use the following:

- `event.pickedRowsData["PriceEntry_c.EntryProductName_Id_c"].Id`
- `event.pickedRowsData["PriceEntry_c.EntryProductName_Id_c"].RecordName`

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.

Can I remove the Add button to prevent adding account addresses?

Unfortunately, the Addresses region in the Edit Accounts page in classic Sales isn't extensible. However, you have a couple of other options to prevent users from adding account addresses.

Option 1: Remove the Manage Address Privilege from Role

Even though you can't remove the Add button using Oracle's configuration tools, you can remove the privilege, Manage Address, from users' roles. Users without the Manage Address privilege have read-only access to addresses. See [How do I edit job or abstract roles?](#) for more information.

Option 2: Use Single Address Region in the Edit Accounts Page

There's another option as well. You can disable the multiple addresses region and enable the single address region instead. This will remove the Add button, because then only one address can be displayed in the Edit Accounts region. See [How can I enable multiple addresses for accounts?](#) for more information.

How do I edit job or abstract roles?

To edit user roles, you always create a custom role by copying a predefined job role or abstract role and then editing the copy.

Note: You must have the IT Security Manager job role to perform these security tasks.

High-Level Steps to Copy and Edit Predefined Roles

Here are the high-level steps to copy and edit predefined job and abstract roles.

CAUTION: While creating custom roles, make sure you assign only the required privileges. Assigning all the privileges could impact license usage. Before you proceed, see the topic, What should I know about copying and editing predefined roles?

1. *Copy a Role*
2. *Edit the Copied Role*
3. *Add or Remove Existing Functional Security Privileges for the Role*
4. *Manage Data Security Policies for the Role*
5. *Add or Remove Roles That the New Role Inherited*
6. *Assign the New Role to Users*
7. *Review the Role*

Copy a Role

To copy a job or abstract role:

1. On the Roles tab of the Security Console, search for the role to copy.
2. Select the role in the search results. The role hierarchy appears in tabular format by default.

Tip: Click the **Show Graph** icon to show the hierarchy in graphical format.

3. In the search results, click the down arrow for the selected role and select **Copy Role**.
4. In the **Copy Options** dialog box, select a copy option.
5. Click **Copy Role**.
6. On the Copy Role: Basic Information page, review and edit this information as appropriate:
 - o Role Name
 - o Role Code
 - o Description
 - o Enable Role for Access from All IP Addresses (appears only if location-based access is enabled)

Tip: 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. You can overwrite these values for the role that you're copying. However, any roles inherited by the copied role are unaffected by any name changes that you make here.

7. Click the **Summary and Impact Report** train stop.
8. Click **Submit and Close**, then **OK** to close the confirmation message.

9. Review the progress of your copy on the Role Copy Status subtab of the Security Console Administration tab. Once the status is Complete, you can edit the copied role.

Edit the Copied Role

Edit the copy of the job or abstract role:

1. On the Roles tab of the Security Console, search for and select the role.
2. In the search results, click the down arrow for the selected role and select **Edit Role**.
3. On the Edit Role: Basic Information page, you can edit the role name and description, but not the role code. If location-based access is enabled, then you can also manage the **Enable Role for Access from All IP Addresses** option.
4. Click **Next**.

Add or Remove Existing Functional Security Privileges for the Role

On the Edit Role: Function Security Policies page, any function security privileges granted directly to the copied role appear on the Privileges tab. Click **Load Inherited Policies** to populate the table with the privileges that the role inherited.

To view details of the code resources that a privilege secures, **select the privilege** in the Details section of the page.

You can add or remove existing privileges from the copied role. To delete a privilege that's added directly to the copied role, select the privilege and click the **Delete** icon.

Note: You can't delete inherited privileges. And, you can't create new functional security policies.

To add a privilege to the copied role:

1. Click **Add Function Security Policy**.
2. In the **Add Function Security Policy** dialog box, search for and select a privilege or role.
3. If you select a role, then click **Add Selected Privileges** to add all function security privileges from the role to your custom role. If you select a single privilege, then click **Add Privilege to Role**.
4. Click **OK** to close the confirmation message.
5. Repeat to add more privileges.
6. Close the **Add Function Security Policy** dialog box.

All the privileges you selected are listed on the Edit Role: Function Security Policies page.

7. Click **Next**.

The Resources tab, which is read-only, lists any resources granted to the role directly rather than through function security privileges. Because you can't grant resources directly to roles on the Security Console, only resource grants created before Release 12 could appear on this tab. You can't edit these values.

Manage Data Security Policies for the Role

On the Edit Role: Data Security Policies page, any data security policies granted to the copied role appear. You can add or remove policies from the copied role and you can edit the existing policies.

Click **Next** to continue to the next page.

Add or Remove Roles That the New Role Inherited

The Edit Role: Role Hierarchy page shows the copied role and its inherited duty roles. The hierarchy is in tabular format by default but you can switch to graphical mode. You can add or remove roles.

To remove a role:

1. Select the role in the table.
2. Click the **Delete** icon.
3. Click **OK** to close the confirmation message.

To add a role:

1. Click the Add Role icon.
2. In the **Add Role Membership** dialog box, search for and select the role to add.
3. Click **Add Role Membership**.
4. Click **OK** to close the confirmation message.
5. Repeat for other roles.
6. Close the **Add Role Membership** dialog box.
The Edit Role: Role Hierarchy page shows the updated role hierarchy.
7. Click **Next**.

Assign the New Role to Users

On the Edit Role: Users page assign the copied role to a user by adding or removing user access to the role.

Add user access to a role:

1. Click the **Add User** button.
2. In the **Add User** dialog box, search for and select a user or role (job or abstract role).
3. If you select a role, then click **Add Selected Users** to add all the users assigned the role to your custom role. If you select a single user, then click **Add User to Role**.
4. Click **OK** to close the confirmation message.
5. Repeat from step 2 for additional users.
6. Close the **Add User** dialog box.
The Edit Role: User page shows the updated role membership.
7. Click **Next**.

To remove user access to a role:

1. Select the user in the table.
2. Click the **Delete** icon.
3. Click **OK** to close the confirmation message.

Review the Role

On the Edit Role: Summary and Impact Report page, review the summary of changes. Then do the following:

1. Click **Back** to make corrections.
2. When you've completed any changes, click **Save and Close** to save the role.
3. Click **OK** to close the confirmation message.

The role is available immediately.

What should I know about copying and editing predefined roles?

Copying predefined roles and editing the copies is the recommended approach to creating roles for your own business purposes. This recommended approach comes with some guidelines you should be aware of.

Note: You can copy the predefined roles but can't edit them. Predefined roles have role codes with the prefix `ORA_`.

Options When Copying Roles

When you copy a role using the Security Console, you can:

- Copy the top role only (shallow copy); or,
- Copy the top role and its inherited roles (deep copy)

Copying the Top Role

If you select the **Copy top role** option, you copy only the role you have selected. The source role has links to roles in its hierarchy, and the copy inherits links to the original versions of those roles. Subsequent changes to the inherited roles affect not only the source top role, but also your copy. The result of selecting the Copy top role option, therefore, is as follows:

- You can add roles directly to the copied role without affecting the source role.
- You can remove any role that's inherited directly by the copied role without affecting the source role.
- If you remove any role that's inherited indirectly by the copied role, then the removal affects both the copied role and any other role that inherits the removed role's parent role, including the source role.
- If you edit any inherited role, then the changes affect any role that inherits the edited role. The changes aren't limited to the copied role.

To edit the inherited roles without affecting other roles, you must first make copies of those inherited roles. You can either select the **Copy top role and inherited roles** option or copy individual inherited roles separately, edit the copies, and use them to replace the existing versions.

Copying the Top Role and Inherited Roles

If you select the **Copy top role and inherited roles** option, you copy not only the role you have selected, but also all of the roles in its hierarchy. Your copy of the top role is connected to new copies of subordinate roles.

Note: Inherited duty roles are copied if a copy of the role with the same name doesn't already exist. Otherwise, the copied role inherits links to the existing **copies** of the duty roles.

When inherited duty roles are copied, you can edit them without affecting other roles. Equally, changes made subsequently to duty roles in the source role hierarchy aren't reflected in the copied role.

Review the Role Hierarchy

When you copy a predefined job, abstract or duty role, it's recommended that you first review the role hierarchy to identify any inherited roles that you want to either copy, add, or delete in your custom role. You can review the role hierarchy on the Roles tab of the Security Console in either graphical or tabular format. You can also:

- Export the role hierarchy to a spreadsheet from the Roles tab.
- Review the role hierarchy and export it to a spreadsheet from the Analytics tab.
- Run the User and Role Access Audit Report.

Job and abstract roles inherit function security privileges and data security policies from the roles that they inherit. Function security privileges and data security policies can also be granted directly to a job or abstract role. Review these directly granted privileges on the Roles tab of the Security Console, as follows:

- In the graphical view of a role, its inherited roles and function security privileges are visible at the same time.
- In the tabular view, you set the **Show** value to switch between roles and function security privileges. You can export either view to a spreadsheet.

Once your custom role exists, edit it to add or remove directly granted function security privileges.

Note: Data security policies are visible only when you edit your role; they don't display in the graphical or tabular role views. However, you can view the data security policies assigned to a role from the Analytics tab of the Security Console.

Guidelines When Naming Copied Roles

By default, a copied role has the same name as its source role with the suffix **Custom**. The role codes of copied roles have the suffix **_CUSTOM**. Copied roles lose the prefix **ORA_** automatically from their role codes. You can define a local naming convention for custom roles, with a prefix, suffix, or both, on the Roles subtab of the Security Console Administration tab.

Note: Copied roles take their naming pattern from the default values specified on the Roles subtab of the Security Console Administration tab. You can override this pattern on the Copy Role: Basic Information page for the role that you're copying. However, the names of roles inherited by the copied role are unaffected. For example, if you perform a deep copy of the Employee role, then duty roles inherited by that role take their naming pattern from the default values.

If any role in the hierarchy already exists when you copy a role, then no copy of that role is made. For example, if you make a second copy of the Employee role, then copies of the inherited duty roles might already exist. In this case, the copied role inherits links to the existing **copies** of the roles. To create unique copies of inherited roles, you must enter unique values on the Administration tab of the Security Console before you perform a deep copy. To retain links to the predefined job or abstract role hierarchy, perform a shallow copy of the predefined role.

Copying Roles and Access Groups

When you copy a job role, a custom job role is created that includes the same duty roles and the same function and data security policies as the original role. A system access group is also generated for the custom job role, but it isn't assigned any object sharing rules.

To provide your users with data access using the access group generated for the custom role, you must either add rules to the group manually, or copy the rules from the access group generated for the source role you copied, then edit the

rules as required. For additional information, see the topics Overview of Managing System Access Groups and Copy Object Sharing Rules from One Access Group to Another in the Access Groups chapter.

Report and Analytics Roles

You can't copy roles that are used to secure sales analytics and reports. Therefore you can't copy any of the following types of roles:

- Transaction Analysis Duty roles
- Business Intelligence roles
- Any role with a role code prefix of OBIA, for example, OBIA_ANALYSIS_GENERIC_DUTY

You can, however, add any of these roles to custom job roles that you create. When you create a custom job role, either from scratch or by copying an existing job role and editing it, make sure that the role is assigned the BI Consumer role and BI Author role if the custom role is to provide access to analyses and reports. The BI Consumer role provides view-only access to analyses and reports; the BI Author role provides access to create and edit analyses and reports.

How do I capture and claim expenses in Partner Relationship Management?

You can capture and claim marketing expenses in Partner Relationship Management using the Marketing Development Funds functionality. Here's how you can go about it:

- **MDF Budgets:** Create and manage MDF budgets that you can use to track funds used for channel marketing activities that your partners carry out. You can also create budgets exclusively for a specific partner, and manage fund requests and claims associated with the marketing budget.
- **MDF Requests:** You can use this functionality to request funds, which can be allocated from marketing budgets, to implement strategic marketing activities.
- **MDF Claims:** You can use this functionality to submit claims seeking reimbursement for the marketing expense incurred. It helps you track the progress of claims from submission to payment. You can approve, reject, return, or withdraw a claim as required. You can also view all the claims submitted by partner users or create and submit claims against any approved request yourself on behalf of a partner.
- **MDF Claim Settlements:** You can track the progress of your claim payment and capture your claim payment information.

How can I view the Parent and Ultimate Parent account fields in Workspace and Redwood User Experience?

If you want the Parent and Ultimate Parent fields to be displayed in the UI, either as a filter or as a column in search results, then you must first enable them on the Setup tab of the Configure Adaptive Search page and run the Publish job. Make sure to enable the fields for display also on the Configure UI tab. See [How do I make a field searchable in the UI?](#) for more information about how to do this.

Once the fields are enabled for display, you must run the **Refresh Denormalized Data for Account Hierarchy** scheduled processes to refresh the denormalized data for the account hierarchy. This scheduled process is used to update and organize the information about accounts. For more information about how to run this process, see [How do I refresh denormalized data for account hierarchy?](#)

When the Refresh Denormalized Data for Account Hierarchy job completes, run the **Periodic Refresh** scheduled processes. When the process completes, the values for the **Parent** and **Ultimate Parent** account fields are displayed in the account hierarchy for both Workspace and Sales in the Redwood user experience.

Are there any tools that automate migration of pages and layouts to Oracle Sales in the Redwood User Experience?

No. While Application Composer continues to be the tool for defining fields and objects, you must use Oracle CX Extension Generator and Oracle Visual Builder Studio to recreate custom UI pages for Oracle Sales in the Redwood User Experience. The CX Extension Generator helps speed up the migration by automating many of the UI creation steps.

Related Topics

- [Create a New Application Using the CX Extension Generator](#)

How do I import account contact data?

You can use Import Management to create update, or delete Account Contact records as child under Account object. This automatically also creates relationship record, associating referenced contact and account which can be viewed under relationship child object.

To import Account Contact records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the CSV file for a successful import.

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent or referenced records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can import account contact object by submitting any one or more of the conditionally required attributes. You can provide a combination of Account and Contact identifiers for create and update. Alternatively for Update scenario, you can provide the primary unique identifier or one of the relationship identifiers.

List of Contact Identifiers:

- ContactPartyId
- ContactPartyNumber
- ContactSourceSystem and ContactSourceSystemReferenceValue

List of Account Identifiers:

- AccountPartyId
- AccountPartyNumber
- AccountSourceSystem and AccountSourceSystemReferenceValue

List of Relationship Identifier:

- RelationshipRecId
- RelationshipSourceSystem and RelationshipSourceSystemReferenceValue

Primary unique identifier: AccountContactId is the primary unique identifier which is auto generated. You can use this identifier to update account contact record.

Required Attributes and Validations for Account Contact Object

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

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Account Contact Record	Updating an Existing Account Contact Record
AccountContactId	The unique identifier of the account contact which is system generated.	Should be a valid value which exists in the application	Not Applicable	Conditionally Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Account Contact Record	Updating an Existing Account Contact Record
RelationshipRecId	Alternate unique identifier for the account contact which is system generated.	Should be a valid value which exists in the application	Not Applicable	Conditionally required
ContactPartyId	The primary key identifier of the subject in this relationship. Either one of ContactPartyId, ContactPartyNumber, or a combination of ContactSourceSystem and ContactSourceSystemReference is used to identify the subject party of the relationship.	The contact must exist	Conditionally Required Provide a value along with Account identifier to uniquely identify referenced account and contact records to create account contact record	Conditionally Required Provide a value along with Account identifier to uniquely identify account contact record for update
ContactPartyNumber	The public key identifier for the Contact party of the relationship. Either one of ContactPartyId, ContactPartyNumber, or a combination of ContactSourceSystem and ContactSourceSystemReference is used to identify the Contact party of the relationship.	The contact must exist	Conditionally Required Provide a value along with Account identifier to uniquely identify referenced account and contact records to create account contact record	Conditionally Required Provide a value along with Account identifier to uniquely identify account contact record for update
ContactSourceSystem	The name of external source system for the subject party in the relationship, which are defined by an administrator as part of system setup. To be used in combination of ContactSourceSystemReference	The value for this attribute should be predefined using the setup task Manage Trading Community Source Systems	Conditionally Required Provide a value along with ContactSourceSystemReference for uniquely identifying a contact record Additionally, provide an Account Identifier	Conditionally Required Provide a value along with ContactSourceSystemReferenceValue for uniquely identifying a contact record Additionally, provide an Account Identifier
ContactSourceSystemReference	The identifier for the subject party in the relationship from external source system. To be used in combination with ContactSourceSystem.	The Source System Reference value should exist for the Contact	Conditionally Required Provide a value along with ContactSourceSystem for uniquely identifying a contact record Additionally, provide an account identifier	Conditionally Required Provide a value along with ContactSourceSystem for uniquely identifying a contact record Additionally, provide an account identifier
AccountPartyId	The primary key identifier of the object in this relationship. Either one of AccountPartyId, AccountPartyNumber, or combination of AccountSourceSystem and	The Source System Reference value should exist for the Contact	Conditionally Required Provide a value along with Contact identifier to uniquely identify referenced account and	Conditionally Required Provide a value along with Contact identifier to uniquely identify account contact record for update

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating an Account Contact Record	Updating an Existing Account Contact Record
	AccountSourceSystemReferenceValue is used to identify the Account party of the relationship.		contact records to create account contact record	
AccountPartyNumber	The public unique identification number for the object party of the relationship. Either one of AccountPartyId, AccountPartyNumber or combination of AccountSourceSystem and AccountSourceSystemReferenceValue is used to identify the Account party of the relationship.	No Validation	Conditionally Required Provide a value along with Contact identifier to uniquely identify referenced account and contact records to create account contact record	Conditionally Required Provide a value along with Contact identifier to uniquely identify account contact record for update
AccountSourceSystem	The name of external source system for the subject party in the relationship, which are defined by an administrator as part of system setup. To be used in combination with AccountSourceSystemReferenceValue.	The value for this attribute should be predefined using the setup task Manage Trading Community Source Systems	Conditionally Required Provide a value along with AccountSourceSystemReferenceValue for uniquely identifying an account record Additionally, provide a contact identifier	Conditionally Required Provide a value along with AccountSourceSystemReferenceValue for uniquely identifying an account record Additionally, provide a contact identifier
AccountSourceSystemReferenceValue	The name of external source system for the subject party in the relationship, which are defined by an administrator as part of system setup. To be used in combination with AccountSourceSystem.	The Source System Reference value should exist for the Account	Conditionally Required Provide a value along with AccountSourceSystem for uniquely identifying an account record Additionally, provide a contact identifier	Conditionally Required Provide a value along with AccountSourceSystem for uniquely identifying an account record Additionally, provide a contact identifier
RelationshipSourceSystem	The name of external source system for the relationship record, which are defined by an administrator as part of system setup. To be used in combination with RelationshipSourceSystemReferenceValue.	The value for this attribute should be predefined using the setup task Manage Trading Community Source Systems	Optionally Required	Conditionally Required for uniquely identifying an account contact record Additionally, provide a value for RelationshipSourceSystemReferenceValue.
RelationshipSourceSystemReferenceValue	The name of external source system for the relationship record, which are defined by an administrator as part of system setup. To be used in combination with RelationshipSourceSystem.	The Source System Reference value should exist for the Contact.	Optionally Required	Conditionally Required for uniquely identifying an account contact record Additionally provide a value for RelationshipSourceSystem

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

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

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

Review the Import Results

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

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

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [How You Use Alternate Keys to Import Records](#)

Is inline editing of records available from Workspace?

No. Inline editing is available only in the legacy work areas. Workspace, which uses the Adaptive Search engine, currently doesn't support inline editing for records displayed in Workspace list pages.

Is there a limit to the number of leads that I can create in my sales application?

There's no threshold limit or maximum number of records that you can create in your sales application for your Sales Lead object.

Can I view orchestration steps from my lead and opportunity guidance panels?

Yes. Each orchestration step that requires you to take an action appears at the top of the Guidance panel for opportunity and lead overview pages. Note that the Guidance panel gets displayed only if there's an active orchestration running on the specific lead or opportunity records that you're viewing.

From the Guidance panel, you can:

- Take any recommended actions
- Navigate to areas based on the guidance
- Autocomplete steps
- Skip steps or manually complete steps
- Get a snapshot of the objectives status in the current stage
- Access the Orchestration Subview from where you can:
 - View all objectives grouped by Stages
 - View a dynamic list of actionable steps for the Complete Sales Lifecycle Cycle

For more information, see [How Salespeople Interact with Orchestration](#) in the How do I get started with Orchestration? solution playbook on the [Oracle Help Center Sales > Playbooks](#) page.

How do I automatically populate a field value based on another field value without using a picker in Oracle Sales in the Redwood User Experience?

You can add an `on-picker-value-changed=""` and set up a listener as the value. Pass in the raw event. The payload in your action chain of `event.detail.event.detail.value` (or `.previousValue`) will give you the key of the cx-picker DCL. Note the double `event.detail` is required because this event wraps an `oj-select-single` event.

How do I configure the Edit Details page for accounts in Oracle Sales in the Redwood User Experience?

To configure the Edit Details page for accounts in Oracle Sales in the Redwood User Experience:
Drill in to an account record, click **Details** to display the Edit Details page, and edit the page in Oracle Visual Builder Studio. For detailed steps, see the topic *Configure the Create and Edit Layouts*.

Can I remove the currency symbols from the opportunity amounts listed in Workspace?

No, the currency symbols that show up in the lists of opportunities in Workspace are hard-wired, so you can't remove them. However, you could create a custom field for the currency amounts and display that instead.

How do I enable multiple currencies in Sales?

Oracle Sales objects like opportunities and leads support multiple currencies.
This table has the high-level steps to set up multiple currencies in sales:

Step	Description	Where to Find More Information
Set the default currency profile options.	Set the two profile options that specify default corporate currency and rate type.	See: <i>Set Default Currency Profile Options</i>
Check the setting of the default currency profile option.	Check the setting of the default currency profile option. This currency is the default used for	See: <i>Check Default Currency Profile Option Setting</i>

Step	Description	Where to Find More Information
	salespeople in the transactional pages. The default currency is also used in a salesperson's forecast.	
Ensure currencies are enabled and verify precision.	Ensure that all of the currencies you plan to use are enabled for use and verify the precision.	See: Ensure Currencies are Enabled and Verify Precision
Set the multicurrency profile option for opportunities.	By default, one currency is set for an opportunity and its product lines. This default currency is a salesperson's preferred currency. If you want to enable multiple currencies for opportunities, set the multicurrency profile option.	See: How do I allow salespeople select a different currency in Opportunities and Leads?
Let salespeople select the currency when editing leads and opportunities.	In the opportunity and lead edit pages, the Currency list of values is read-only by default. If you've enabled multiple currencies, you can let users pick a different currency at the header level by making the Currency field editable.	See: How do I allow salespeople select a different currency in Opportunities and Leads?
Enter currency daily rates.	To load daily rates, you can use a spreadsheet or web services.	See: Load Daily Rates Automatically Using Web Services
Define and maintain daily currency conversion rates and conversion rate types.	The conversion rate is the ratio between two currencies; it shows how much of one money exchanges for another. Conversion rates are also known as foreign exchange rates. You define and maintain different conversion rates between currencies for the same period using conversion rate types.	See: Enter Daily Rates Using the Daily Rates Spreadsheet

Set Default Currency Profile Options

Your first step in the setup is to specify the default corporate currency and rate type by setting the Corporate Currency Default and Exchange Rate Type Default profile options.

Here's how you set the profile options:

1. As a setup user, in Setup and Maintenance, go to:
 - o Offering: Sales
 - o Functional Area: Company Profile
 - o Task: Manage Currency Profile Options
2. On the Manage Currency Profile Options page, click **ZCA_COMMON_CORPORATE_CURRENCY** and set it to your default corporate currency. The display name for this profile option is Corporate Currency Default. It stores configured corporate currency used across the applications.
3. Save your changes.
4. Click **ZCA_COMMON_RATE_TYPE** and set it to the default currency rate type. The display name for this profile option is Exchange Rate Type Default. It stores the default currency exchange rate type.

Check Default Currency Profile Option Setting

You also need to check the setting of the profile option that specifies default currency for users in the applications. The profile option, Default Currency (FND_CURRENCY), not only specifies the default currency in the transactional pages, it's

also used in a salesperson's forecast. By default, the profile option is set to US dollar. You can set this profile option at site level (affecting all users of the environment), at product level, or at user level.

Note: Users can set their own currency preference in the Personalization screens available in the user name menu in the global header. The setting users set for themselves override the settings that you make in the profile options screens at site or product level.

Here's how to check the default currency setting:

1. In the Sales offering, go to:
 - Functional Area: Sales Foundation
 - Task: Manage Administrator Profile Values

Note: If you can't find this profile option, search for it from the main Sales offering page, using the search available in the Tasks widget available in the collapsed panel on the page.
2. On the Manage Applications Core Administrator Profile Values page, search for and select the profile option name, Default Currency, or the code, FND_CURRENCY.
3. Ensure the profile option value is set to your environment's default currency at site level.

To set the profile option for a specific user, create a new row in the table and enter the values as needed.

Ensure Currencies are Enabled and Verify Precision

By default, all currencies are enabled. But it's a good idea to double-check that all of the currencies you plan to use are enabled and that their precision levels are set correctly. Precision is the number of digits placed after the decimal point. For example, set USD to precision 2 to display one dollar as \$1.00 in the UI.

Here's how to check:

1. In the Sales offering, go to:
 - Functional Area: Company Profile
 - Task: Manage Currencies
2. On the Manage Currencies page, click **Search** to search for all currencies, without entering any search criteria.
3. Check that the **Enabled** option is set for each currency you plan to use.
4. Check that the **Precision** is set consistently for each currency you plan to use.

Note: When setting currency precision, be sure to set it correctly for all currencies you plan to use. This best practice ensures that decimal places are shown consistently in the UI for all the currencies you're using.

5. If you made any changes, save your work.

Overview of Defining Daily Currency Conversion Rates

You have a few options for defining daily currency conversion rates, and you can maintain daily currency conversion rates between any two currencies. You can also enter daily conversion rates for specific combinations of foreign currency, date, and conversion rate type. The ways you can load currency rates are:

- Load them manually using the Create Daily Rates spreadsheet.
- Load them automatically using web services.

For more information, see the related topics.

Related Topics

- [Enter Daily Rates Using the Daily Rates Spreadsheet](#)
- [Load Daily Rates Automatically Using Web Services](#)

How do I allow salespeople select a different currency in Opportunities and Leads?

For salespeople to be able to select a different currency in opportunities and leads, you must make the field editable. By default, the currency selection field isn't editable for leads and opportunities.

Here's how to make the currency field editable:

1. Ensure you're working in an active sandbox.
2. Navigate to **Configuration > Application Composer**.
3. In the navigation tree, expand **Standard Objects**, expand **Opportunity** or **Sales Leads**, and click **Pages**.
4. In the region that corresponds to the page you're modifying, duplicate the standard layout and edit the resulting layout. For example, if you're making the field editable in opportunities, in the Creation Page Layout region, duplicate the standard layout and then edit the resulting layout.
5. Select the newly created layout, click **Actions** and then click **Edit UI Properties** from the drop-down list.
6. Select **Currency** from the Field Selection drop-down list.
7. Select the custom layout in the Layout Properties section.
8. Click **Update**.
9. Select the **Updatable** option.
10. Click **Submit**.
11. Click **Done** on the Edit UI Properties: Creation Layout window and save your changes.
12. While still in the active sandbox, navigate to **Sales > Opportunities** or **Sales > Leads** as a user who's a sales resource, such as a sales administrator or sales representative. Verify the change by editing an opportunity or lead and validating that the **Currency** field is a drop-down list that users can select.
13. Publish the sandbox according to your company's business practices.

How do I change the text of a warning message in Oracle Sales in the Redwood User Experience?

To change the text of a warning message in Oracle Sales in the Redwood User Experience, you can use the User Interface Text tool. Use the tool to change the text of warning, error, and confirmation messages and text in the UI.

For details, see the topic [Modify Text Using User Interface Text Tool](#).

How do I enable Opportunity and Lead activity configurations for Orchestration?

You must first enable the orchestration feature by setting the profile option Enable Orchestration (ORA_ZCA_ENABLE_ORCHESTRATION) to Yes at the site, lead, and opportunity management levels. If you're already using Activities (the Activity Stream), then you must enable certain attributes to work with Orchestration.

Note: If you're new to Sales in the Redwood user experience and you created and activated activities configurations, then no further action is required.

If you haven't created your own activity configurations for sales leads and opportunities, then see [How to Enable Orchestration If You Haven't Created Custom Activity Configurations](#) in the How do I get started with Orchestration? solution playbook on the [Oracle Help Center Sales > Playbooks](#) page for more information.

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

Related Topics

- [Enable the Orchestration feature](#)
- [Enable Opportunity and Lead Activity Configurations for Orchestration](#)

Why can't I convert a lead to an opportunity?

Only standard roles for the lead owner or sales administrator can convert leads to opportunities. In addition, lead to opportunity conversion depends on the privileges assigned to your role, your access level as a lead sales team member, and the current status of the lead.

You can convert a lead to an opportunity from the Actions menu by selecting **Convert**. This action creates an opportunity based on lead information. When a lead is converted to an opportunity, the lead status is set to Converted.

Note: Your administrator can assign the Convert Sales Lead (MKL_CONVERT_SALES_LEAD_PRIV) functional privilege and the Sales Lead Follow Up (ORA_MKL_SALES_LEAD_FOLLOW_UP_DUTY) roles to users who aren't lead owners but need to convert leads to opportunities. See the Data Sharing Mechanisms and Object Visibility chapter of the Securing Sales and Fusion Service guide on Oracle Help Center (<https://docs.oracle.com>).

After creating the custom role, run the following scheduled processes from **Navigator > Tools > Scheduled Processes**.

- Retrieve Latest LDAP Changes
- Send Pending LDAP Requests
- Import User and Role Application Security Data

- Synchronize User GUID

After all the jobs run successfully, test by converting a lead to an opportunity from your sales leads UI.

How do I export data?

You can export your object data using the Export Management option from the Tools work area. This topic is your guide to exporting data.

You can find the list of objects supported in Export Management in [How do I manage export objects?](#)

To export data:

1. Click **Tools > Export Management**.
2. On the **Manage Exports** page, click the **Create Export Activity** button.
3. On the Enter Export Options page, enter values for each of the following fields:

Field	Description of the value
Name	The name of the export activity.
Object	The object to export. You must select the parent or child object from the drop-down list. If you can't find an object in the drop-down list, then click the Search link. In the Search and Select dialog box, enter the object name in the Object text box and click the Search button. Select your object from the result list and click OK. You can also use the advanced search option by clicking the Advanced button. Here you can search based on various filter criteria such as object name, attachment supported, creation date, and so on. Note: If the object you're exporting isn't listed then verify if you have the roles and privileges required to export the object. For information on the roles, see the topic Roles Required for Import and Export Management referenced in the Related Topics section. The object must not include any field with display name length greater than 120 characters. Your export job may fail if it includes a field with display name length greater than 120 characters.
Description	The optional description of the export activity.
File Name	The name of the export file to generate in ZIP format. This field is populated based on the object and date time stamp.

Field	Description of the value
Export Attachments	Select to export the attachments related to the object. This option is enabled only if the selected object supports attachments.

4. Optionally to set additional export configurations, click the **Advanced Options** section. Here you can configure settings in the **Output File**, **Export Options**, or **Create Schedule** sections.
- Following are the options in the Output File and Export Options regions:

Option	Description	Default Value
Delimiter	If your file doesn't use a comma to separate values, then select the correct delimiter in the Delimiter drop-down list. Possible values are: - Caret Symbol - Closing Curly Bracket - Closing Parenthesis - Closing Square Bracket - Colon - Comma - Exclamatory Mark - Minus - Opening Curly Bracket - Opening Parenthesis - Opening Square Bracket - Pipe Symbol - Plus - Question Mark - Semi-Colon - Star Symbol - Tilde Symbol	Comma
Escape Special Characters	If selected, then RFC4180 format is used, and quotes are escaped with another set of quotes.	Deselected
Decimal Separator	The decimal separator used in your export file. Possible values are Comma and Period.	Period
Date Format	The format of the date fields in your file. Possible values are:	US - MM/DD/YYYY

Option	Description	Default Value
	- EU-YYYY/MM/DD - ISO 8601 - YYYY-MM-DD - UK/Canada - DD/MM/YYYY - US - MM/DD/YYYY	
Time Stamp Format	The format of time fields in your file. Possible values are: - Canada - DD/MM/YYYY hh:mm:ss PM - EU - YYYY/MM/DD 24:mm:ss - ISO 8601 - YYYY-MM-DDThh:mm:ss sss+/-hh:mm - UK - DD/MM/YYYY 24:mm:ss - US - MM/DD/YYYY hh:mm:ss PM	US - MM/DD/YYYY hh:mm:ss PM
File Encoding	The format in which the characters within your source file are encoded. Possible values are: - Chinese Simplified - GB, CP936 - Chinese Traditional - CP950 - Eastern European - Win, CP1250 - Greek - MS Windows, CP1253 - Japanese - Shift-JIS, CP932 - Unicode - UTF - 8 - Unicode - UTF - 16 - Unicode - UTF - 16BE, Mac, Unix - Unicode - UTF - 16LE, MS Windows - Western European - Win, CP1252	Unicode - UTF - 8
End of Line	The character used to indicate end of line in the export file. Possible values are: - Carriage Return - Carriage Return and Line Feed - Line Feed	Line Feed
Quote Character	The character used to indicate a quote. This field is read-only.	N/A
Language Independent Header	Select to export column headers. If you're modifying the exported data manually, then exporting column headers help in automatic mapping during the reimport process.	N/A

Option	Description	Default Value
Notification Email	The email to send export-processing notifications. The user submitting the export receives an email notification automatically. You use this field to specify any additional recipients. If you want to have more than one email recipient, separate the email addresses with a comma or semicolon. You can also specify a mailing list address so that a large number of recipients can be notified. If you don't want to receive the notification, then set the profile option <code>ORA_ZCA_IMPEXP_ENABLE_EMAIL_NOTI</code> to 'N' at user level.	N/A
Enable Split	Select to split the export data set based on a specified record count. On selecting this check box, you can see the Split Size drop-down list, with a default value of 100k. You can specify the split size in multiples of 100k records, ranging from 100k to 1000k. The exported data is split into multiple CSV files, and each file has a maximum of 50K records. You can further split the exported data into multiple ZIP files, based on the specified split size. For example, if your export job retrieves 300k records and split is enabled with a split size of 200k, then 2 export ZIP files are generated. The first ZIP file contains 200k records which is divided into 4 CSV files each with 50k records. The second ZIP file contains 100k records which is then divided into 2 CSV files each with 50k records.	N/A

- In the **Create Schedule** region, you can schedule the export to run either immediately or at a future date. If you select a future date, then provide the date and time to start the export.

You can save the Advanced Options for subsequent reuse by clicking on the Save advance options link in the UI. The options will be retained till you click on the Reset link and reset the options to application defaults.

Note: All fields except Schedule Mode and Schedule start time will be saved.

5. Click **Next**. On the **Map Fields** page you can see the exportable object, its child objects, and the associated attributes. The **Export Mapping** drop-down list shows the maps that were used in earlier export jobs. You can select an existing mapping from the drop-down list and click **Apply**.

You can save your export maps for future use by clicking on the pencil icon (Save As) in the Create Export Activity page. You can also mark your maps as private by checking the **Private Map** check box. Private maps can only be viewed and reused by the user who created and saved the map. Maps marked as private won't get purged by the daily purge job.

Note: Your maps will only be saved once the job is completed.

To select and apply your saved maps, check the **My Maps** check box, select the required map from the **Export Mapping** drop down and click **Apply** in the Create Export Activity page.

6. You can select the child objects to export by selecting the **Enabled** check box. Selecting the **Enabled** check box for a child object displays the associated attributes in the **Available Fields** section. You can select the attributes to export by double-clicking the attribute in the Available Fields list. Alternatively, you can move the attribute from Available Fields list to the **Selected Fields** list. If you select any formula fields for export, it might impact your export performance.
7. You must provide a filter criterion for at least the top-level object. To filter the records to export using conditions, click the **Filter Name** icon. On the **Filter Name** dialog box, you can create the filter for the export attributes using the operators AND, OR, >, <, =, and !=. On the **Fields** tab select the attribute and click the **Insert** button. In the Script Edit window, provide the filter conditions for the selected attribute. After creating the filter criteria script, click **Validate Script**. Click **Save and Close** to save the filter.

Note: You must use GeographyCode='TM' filter to export the Zone Hierarchies. To export both Zone Hierarchy information and Geography Country Information, you need to use filter GeographyCode='TM' Or CountryCode='DE'. For more information see [How to Use Export Management to Export Territory Geography Zone Hierarchies?](#)

8. Click **Next**. On the **Review and Submit** page, review the export activity configuration. If you want to change any configuration, then click the **Back** button. Submit to activate the export activity. After the export activity completes, clicking the **My Completed Exports** infotile shows your export status. Click the ZIP file link in the **Exported Data File** column to download the exported file.

You can cancel the export by clicking the Cancel icon in the Manage Exports page when the job status is Paused, Queued for Export, Preparing data to Export, or Exporting Data.

Note: The cancel job option is available for the logged in user and the hierarchy user only when the profile option ORA_ZCA_IMPEXP_RESTRICT_USERACCESS is enabled.

Note: CSV String Escape: By default, the escape character is a " (double quote) for CSV-formatted files. If a value contains a comma, a newline character, or a double quote then the string must be enclosed in double quotes. For example: "Newline char in this field \n". A double quote must be escaped with another double quote. For example: "The double quote character "" is offensive.".

Note: By default, you can't view the Personally Identifiable Information(PII) such as mobile numbers in the exported data. To view this information, follow these steps:

1. Navigate to **Tools > Security Console**.
2. Search for the role **ORA_MOT_QUOTA_EXPORT_MANAGEMENT_DUTY**.
3. Edit role and click the **Data Security Policies** link.
4. Click the **Create Data Security Policy** button, and add a new data security policy on the database resource **Trading Community Contact Point** with the following details.
 - Policy Name: Custom Grant on Person Contact and Mobile Phone Data (you can provide any name)
 - Database Resource: HZ_CONTACT_POINTS
 - Data Set: All Values
 - Actions: View Trading Community Person Contact, View Trading Community Mobile Phone Number
5. Click OK to save and navigate to **Summary** step to review and save changes.

Related Topics

- [What are the roles required to import or export data?](#)
- [How You Monitor Export Activity](#)
- [Export Queues](#)

How can I edit Oracle Fusion pages and add fields?

There are a wide variety of tools available for you to configure and extend Oracle Sales and other Oracle Fusion applications.

- You can create additional fields using Application Composer.
- To add fields to pages and change page layout in the classic UI, use Application Composer.
- To add fields and edit the layout of pages in the Redwood user experience, use Oracle Visual Builder Studio. You can tell if a page requires you to use Visual Builder Studio when you see the **Edit Page in Visual Builder Studio** option in the **Settings and Actions** menu on the page.
- To edit text and messages, you can use the User Interface Text tool.

Here are a few places to get started:

- [Overview of Application Configuration and Extension](#)
- [Overview of Using Application Composer](#)
- [Overview of Using Visual Builder Studio](#)
- [Modify Text Using User Interface Text Tool](#)

What's the storage limit and retention period for content stored in UCM?

There's no storage limit and no finite retention period for content stored in Universal Content Management (UCM). UCM provides storage for attachments and other documents in Oracle Fusion Applications.

How do I generate the diagnostics log for import?

The diagnostic log files provide complete information about an import job and its errors. If you have errors in your import job, then provide the diagnostic logs to technical support to help them resolve the issue.

You can generate the diagnostic logs by clicking the Generate button. You can then attach the log files (in ZIP format) to the Service Request (SR). This helps technical support to resolve the issues.

To generate the diagnostic logs for an import:

1. Click **Tools > Import Management**.
2. On the **Manage Imports** page, click the **Name** link for your import that has failed.
3. On the **Import Status** page, click the **Generate Diagnostics** button in the **Action** menu to generate the diagnostics files.

See the Import Attachments section for the link to download the generated files. Click Download under the Actions column to download the file. For more information about the files, click on the details icon.

How do I find Customer Data Management (CDM) subject areas for my reports?

Use the Sales subject areas listed and described in the *Subject Areas for Transactional Business Intelligence* guide for CDM. There aren't any separate CDM subject areas.

How do I send updated sales information from CDM to an integrated outside application?

You can call RESTful SOAP web services from your Groovy scripts in Application Composer.

See the following topics for more information:

- *How to Call RESTful Web Services from Groovy Scripts*

- [How to Call SOAP Web Services](#)
- [Invoking Web Services from Your Scripts](#)

How can I enable filtering of Price Books in Oracle Sales in the Redwood User Experience?

Price Books aren't enabled for Adaptive Search, the search technology used by Oracle Sales in the Redwood User Experience. However, you can use the Price Book REST API to search and filter using multiple terms. For example, a company that manages multiple price books organized in brands and sales groups can use this method to search for price books by brand and by sales group.

To access the REST URL for price books follow this pattern: `https://fa-<podname>-saasfaprod1.fa.ocs.oraclecloud.com/crmRestApi/resources/latest/priceBookHeaders?q=<custom field name>_c=<bindVal>`.

Here's the code to add to the API call headers:

```
REST-Framework-Version as 9

Payload to use -
getQueryStatus() {
  let retQuery = [
    {
      "type": "qbe",
      "provider": "adfRest",
      "q": "StatusCode='ACTIVE'"
    },
    {
      "type": "search",
      "provider": "adfRest",
      "params": [
        {
          "key": "<custom field name>_c",
          "operator": "contains"
        }
      ]
    }
  ];
  return retQuery;
}
```

Related Topics

- [How can I enable filtering of Price Books in Oracle Sales in the Redwood User Experience?](#)

Can I save an OTBI analysis as a .CSV file directly to a UCM location?

In OTBI, you can use BI Agents to trigger alerts and deliver analyses to users by email, phone, and other means, but you can't save analyses as a file directly to an Oracle Content Management (UCM) location. If you do require delivery

to UCM, then recreate your report in Oracle Analytics Publisher (BI Publisher). You can then schedule and send the BI Publisher report to a content server.

For information about using BI Agents to send information using email, see the [Send Email Reports](#) topic in the Creating Analyses and Dashboards in Oracle Transactional Business Intelligence guide.

In BI Publisher, you can specify a content server for your output as described in the topic [Set Output Options](#) in the Using Oracle Analytics Publisher in Oracle Transactional Business Intelligence guide.

Is there a maximum number of fields that you can display in the Details (Edit) page in Oracle Sales in the Redwood User Experience?

There's no limit to the number of fields you can add to the Details (Edit) page in Oracle Sales in the Redwood User Experience. While there's no upper limit, adding a large number of fields can degrade performance and make the page less usable.

How do I export attachments?

This topic explains how to export and download the object attachments to your local directory. Here is a list of objects that support exporting of attachments:

- Account
- Activity
- Assets
- Competitor
- Contact
- ConversationMessage
- DealRegistration
- Household
- HRHelpDeskRequest
- InternalServiceRequest
- Opportunity
- Partner
- PartnerContact
- Product
- ProductGroup
- ServiceRequest
- WrapUp

You can export the attachments in two steps:

1. Export the object records and the attachment information based on the selected search criteria of the object.
2. Download the attachment files from the content management server using the External Data Loader Client tool.

Export the Object Records and the Attachment Information

To export the object records and the attachment information:

1. Click **Tools > Export Management**.
2. On the **Manage Exports** page, click the **Create Export Activity** button.
3. On the **Enter Export Options** page, enter the export activity information such as export name, export object, and the file name. For more information on exporting data, see the topic Export Data.
4. Select the **Export attachment** check box to enable exporting the object attachments. You can optionally enter the advanced configuration options. Click **Next**.
5. On the **Map Fields** page, you can select the attributes to export by dragging them from the **Available Fields** section to the **Selected Fields** section. The **Export Mapping** drop-down list shows the maps used in earlier export jobs. You can select an existing mapping from the drop-down list and click **Apply**. You can select the **Enabled** check box to export the child object attributes.
6. You must provide a filter criterion for at least the top-level object. To filter the records to export using conditions, click the **Filter Name** icon and enter the filter criteria for your object records. Click **Next**. On the **Review and Submit** page, review the export activity configuration and click **Submit**.
7. After the export activity completes, clicking the **My Completed Exports** infotile shows your export status. Click the ZIP file link in the **Exported Data File** column to download the exported file.

Download the Attachment Files

The ZIP file you downloaded in the previous step contains the following files:

- The attachment information CSV file - this file contains information about the attachment records such as content ID, REST resource URL, attachment file name, and so on.
- Attachment download instructions file - this HTML file contains the export details, and the sample EDLC command to download the attachments.

You can use the export command of EDLC to download the attachment files from the content management server to your directory. For example, use the following command to download your attachments exported from the previous step:

```
java -jar oscdataloader.jar export -object Attachments -export-id {export-id} -username {username} -target-url {environment-url} -output-path {output-directory-path}
```

Following are the parameters used in the command:

Parameter	Description
-objects	Indicates the object type exported. Currently this parameter supports only the value Attachments.
-export -id	Job ID of the export job.
-username	User name of the user submitting the export command. This must be the same user who submitted the export activity.
-target-url	URL of the environment.

Parameter	Description
-output-path	Directory path of the folder where the attachment files and reports are downloaded. The reports folder contains details about the attachment files exported, such as their status and error details if any. This should be an existing directory with read and write permissions for the user performing the export.

You can view the details of all available parameters and their descriptions using the command `export -help`.

Related Topics

- [How do I export data?](#)
- [Overview of External Data Loader Client](#)
- [Command-Line Parameters](#)

What is the impact of party merge on all Oracle Fusion applications?

Let's discuss what is a party merge and its impact on all Oracle Fusion applications.

What is a party?

A party, in the Oracle Fusion Customer Data Model, is an entity that can enter into a business relationship, such as buying and selling, and can be of the type Organization, Person, or Group. A party exists separately from any business relationship that it enters into with another party. For example, Vision Corp could be a party within the customer data model. However, Vision Corp can be simultaneously a supplier to its customers and a buyer or customer to its suppliers.

What is party merge?

Party merge is one of the two ways of resolving duplicate records of business entities, the other being linking the parties. You can merge two or more duplicate parties by creating a merge duplicate resolution request. During merge these parties are combined into one primary record. After the merge request is completed, you can update only the master record. The merged duplicate records are also called non-master records. Note that merge supports the transfer of attachments from duplicate records to a master record.

How does party merge impact the different roles and relationships of a party across Oracle Fusion applications?

When you merge parties, the related child entities that get merged include party relationships, contact information, party profiles, customer accounts, and information obtained from third-party sources. Note that you can only merge parties with the same party type. This implies that an organization can only be merged with another organization, a person with a person, and so on. In the case of parties and customer accounts, if you find duplicate parties, you should determine if duplicate customer accounts also exist. When two customer accounts are merged and the corresponding parties are verified as duplicates, the parties can be merged. When two parties are merged and the corresponding customer accounts are verified as duplicates, the customer accounts can be merged. Similarly, you can merge organization contacts between parties that you are merging.

When do deployments perform party merges?

An example of when you perform party merges is during mergers and acquisitions. The Customer Data Management functionality of Oracle CX Sales acts as the customer master during Integration Cloud Service based integration between different cloud services (also known as spoke systems). You can use Customer Data Management to cleanse, consolidate, and share customer data across integrated cloud services.

Example of a party merge

This section explains how the duplicate resolution capability of the Customer Data Management functionality merges records across integrated cloud services, for example, how it merges an Oracle CX Sales and Fusion Service account or contact with an Oracle Service Cloud account or contact.

Party Merge Impacts Across Applications

Many applications are impacted by party merges. Here is a list of applications and how they are impacted by party merges:

Sales

What happens to custom objects in Sales, if they refer to Organizations?

The following information merges with the master party record:

- Information about a product in which the party is interested
- Information about sales leads associated with a party
- Information about the contact associated with the sales lead
- Forecast information for opportunities associated with a party
- Information about sales opportunities associated with a party
- Sales credits assigned to partner identified by the party
- Associations between a party contact and opportunity
- Information about competitors that exist for a sales opportunity
- Employee access to a party, opportunity and lead
- Changes to the parties and lead information that has been modified by a territory definition
- Information about the current environment of a party

The following information transfers to the master party record:

- Customer account plan information

Service

What happens to custom objects in Sales, if they refer to Organizations?

The following information merges with the master party record:

- Service request information associated with parties
- Service request incident location
- Audit information for service requests

- Contact point for a service request that is associated with a party
- Any party site used on a charge line
- Any site and site use that is associated to a party for a service request

Validations

If a service request has more than one contact, these contacts are merged. If duplicate contact points exist for the two contacts that were merged, and these duplicate contact points are then merged, it could result in duplicate records in CS_HZ_SR_CONTACT_POINTS. In this case, the duplicate records are deleted.

Partner Management

The following information merges with the master account record:

- Partner referrals and deal registrations

How do I create merge requests?

When you're sure that two or more records are confirmed duplicates, you can decide to create a duplicate resolution request manually by linking or merging the records.

In this topic, we will be discussing the creation of merge requests.

1. Navigate to the Duplicate Resolution work area as follows: **Navigator** > **Customer Data Management** > **Duplicate Resolution**.
2. Click **Tasks** and then click **Create Resolution Request**.
3. Search for the records that you want to merge, link, or test merge. For example, select the Party Type as Person and enter the Name as John, and click Search.

Note: You can only search on standard fields using the Advanced Search option. Custom fields of the Accounts or Contacts objects aren't available. Select two or more duplicate records using the Shift or Control key.

4. Click **Actions** > **Create Request**.
5. Enter a name for the request in the **Create Request: Select Type dialog**.
6. Select the request type as Generic, Merge, Link, or Test Merge. You can also select the Master Record, if needed.
7. Click **OK**.

You can also submit request dispatch jobs directly from the Duplicate Resolution work area by clicking the Dispatch button, which will submit the job for immediate processing.

Make sure that the status of the merge request changes from Pending to New. After you changed the status to New, you check again, and you see that the main record is set correctly based on the setup you defined using the Manage Customer Data Management Options page.

How do I merge duplicate records?

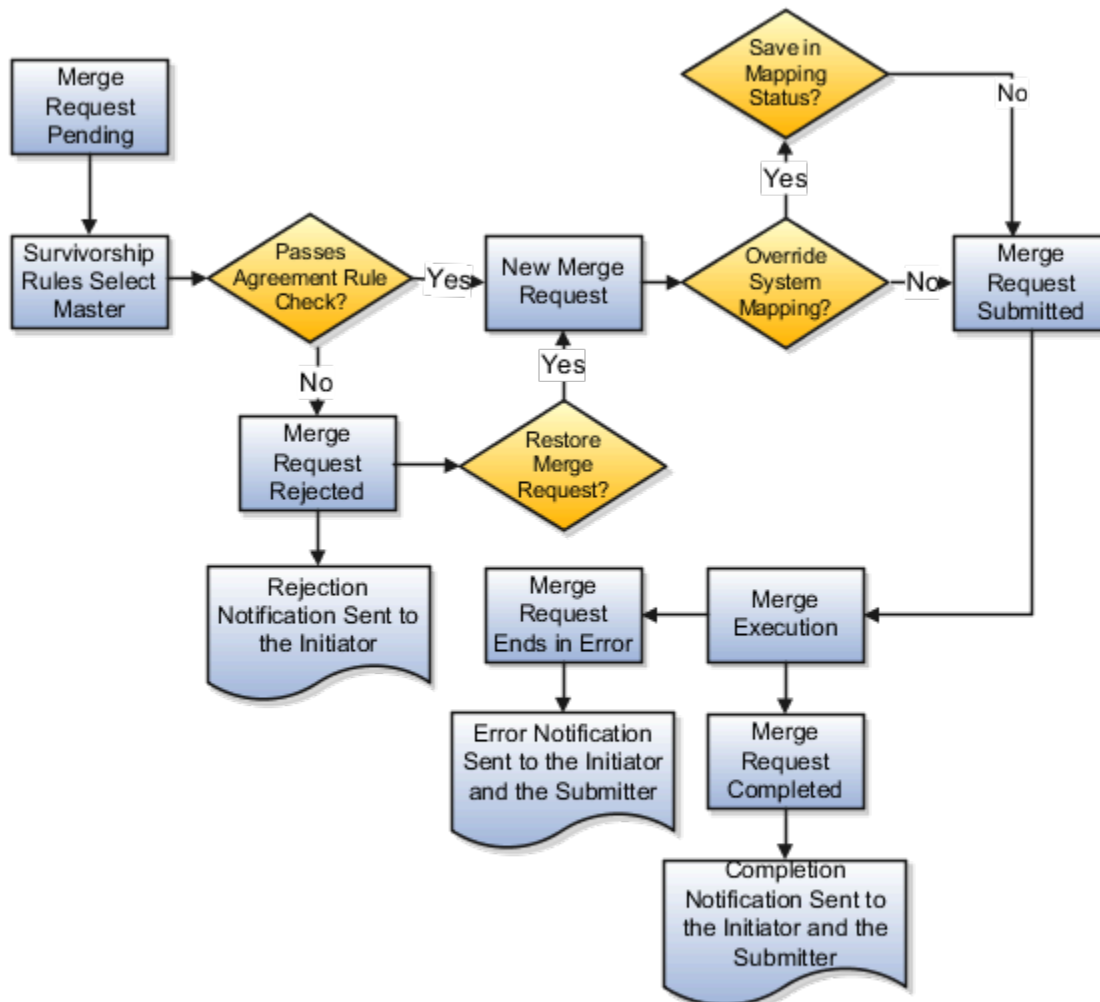
Let's have a look at the process to merge records for resolving duplicates.

Suppose you have created a merge request. Your request may undergo some or all of the following processing stages before the merge is performed. In this process flow, we assume that notifications are turned on. For more information about turning on notifications for merge requests, see the Related Topics section.

- First the survivorship rules are used to determine the master record for the merge.
- After this, the agreement rule check is performed to verify if the merge request is violating any veto conditions. If the agreement rule check succeeds then a check is performed to determine if system mapping must be overridden or not. If the agreement rule check fails, then the merge request is rejected and a rejection notification is sent to the initiator.
- However, a rejected merge request can also be restored in which case a new merge request is created.
- If system mapping is overridden then the new mapping is stored before the merge request can be submitted. After the merge request is submitted, the actual merge is performed.
- If the merge completes successfully then a completion notification is sent to the initiator and the submitter. If the merge fails then an error notification is sent to the initiator and the submitter.

Note: Check if you have the Master Customer Data Management Administrator role to perform merge. Use the Purge Duplicate Resolution Data scheduled process to purge the duplicate resolution data such as resolution logs and to delete duplicate resolution batches and requests. You can schedule this process from the Scheduled Processes work area. You can access this work area as follows: **Navigator > Tools > Scheduled Processes**.

Let's look at the following figure that illustrates the merge process flow.



Merge Request Creation Options

A merge request is created as a result of one of the following:

- The batch duplicate identification process creates a duplicate resolution request automatically for each identified duplicate set.
- A data steward or another user creates a merge request and submits the request through the Create Resolution Request UI page or through the Accounts or Contact UI page.
- A data steward or another user creates a merge request for processing a generic resolution request on the Duplicate Resolution work area.

- You can create a test merge request, examine the results, modify the test merge configuration multiple times until you're satisfied with the merge results, and then create a merge request as per your requirements.
- A bulk or file-based import process creates a merge request.

Note: You can also use the duplicate resolution request web service to create merge requests.

List of Merge Request Statuses

Your merge request may be in different statuses depending on its stage of processing.

This table lists the possible statuses of a merge request.

Status	Description
Pending	All merge requests, and generic duplicate resolution requests, are created with the status as Pending. The requests with pending status require review by a data steward.
New	The request dispatcher is run periodically for pending requests, and sets status of pending requests to New. When the request dispatcher is run, the application selects the master record and attributes based on the survivorship rules, and runs the agreement rule check for the request.
Submitted	This status indicates that the merge request has been submitted for processing. You can also create merge requests with the status as Submitted to process the request without data steward intervention.
Rejected	This status indicates that the merge request is rejected by the data steward or by the process for agreement rule violations. You can restore a rejected merge request.
Error	This status indicates the request has failed because one or more records can't be processed.
Completed	This status indicates that the request has been processed successfully.

How You Select Master and Records to Merge

You can review new merge requests to:

- Select the master record
- Mark records as nonduplicates
- Remove records from the duplicate set to avoid merging them

The merge process selects the master record based on set master rules, if survivorship rules are active. However, you can select to review and override system settings.

When to Override System Mapping

You can override system mappings, during the merge request review, if the system mapping of the request doesn't meet your requirements. You can select the accounts, account addresses, and the relationships that should be merged, transferred, or removed.

Merge Request Related Notifications

You can enable or disable notifications to notify the status of merge requests to interested parties. You can choose to enable notifications while you're creating a duplicate identification batch or while processing individual duplicate resolution requests. For more information about creating a duplicate identification batch, see [Create Duplicate Identification Batches and Define Subset Rules Related Topics](#) section. To receive notifications for individual duplicate resolution requests, select the request and click **Actions** > **Notify** in the Duplicate Resolution work area.

The merge process sends the following related notifications:

- **Rejection:** This notification is sent to the merge request's initiator, such as a business user, salesperson, or administrator. You can restore and resubmit a rejected merge request, by selecting a different master record or by removing some records from the batch.
- **Error:** This notification is sent to the merge request's initiator and submitter. The notification indicates that the merge request has errors and can't be processed.
- **Completion:** This notification is sent to the initiator and the assignee of the merge process. The process merges duplicate records and updates the record hierarchies. The notifications include information such as the master and duplicate records.

After receiving the completion notification, the request initiator and assignee can:

- Verify if the updated hierarchies are correct in the Manage Hierarchies work area.
- Optionally, make the necessary edits to the updated hierarchies.

Related Topics

- [How do I override system mapping?](#)
- [Create Duplicate Identification Batches and Define Subset Rules](#)
- [How You Setup Duplicate Resolution Simplified Profile Options](#)

How can I prevent users from creating appointments?

If you don't want users to create appointments, you have a couple of options:

- Remove the Create Activity (ZMM_CREATE_ACTIVITY_APPOINTMENT_PRIV) privilege from the user's role. Note this action also removes the ability to create other types of activities like tasks. See: [How do I edit job or abstract roles?](#)
- Disable the Create Appointment smart action. See: [How can I hide a smart action from the Actions menu in Workspace objects?](#)

Why can't a sales representative view all products in the audit report?

If users with the Sales Representative role can't see all of the objects in the audit report, do this:

1. Create a custom role.
2. Assign these privileges to the role:
 - Manage Sales Audit Policies (FND_MANAGE_SALES_AUDIT_POLICIES_PRIV)
 - Manage Audit Policies (FND_MANAGE_AUDIT_POLICIES_PRIV)
 - View Audit History (FND_VIEW_AUDIT_HISTORY_PRIV)
3. Assign the custom role to the Sales Representative role.
4. Run the scheduled process Import User and Role Application Security Data.

How can I create rules to automatically provision job roles to sales users?

Before you create sales users, review the predefined role provisioning rules used to automatically assign job and abstract roles to users, and create any additional rules you need.

For example, you might want to create a new resource role and rule to provision a custom job role you've created.

Oracle provides a role provisioning rule for each of the standard resource roles included with the application. But, you must create role provisioning rules for any new resource roles you create.

The provisioning rules use the resource role that you assign to each sales user as the trigger condition for provisioning job roles.

For all internal sales users, including sales administrators, map the Resource abstract role in addition to the required job roles in the provisioning rule. The Resource abstract role lets users access the Resource Directory. Don't add the Resource abstract role for partner roles.

Note: The role provisioning rules Oracle provides are created automatically when you set up your company information using the Create Company Information quick setup task. If you didn't use the Create Company Information quick setup task, then you must create all of these role-provisioning rules manually.

Review Existing and Create New Provisioning Rules

Use these steps to review existing provisioning rules, and to create new rules:

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 Manage Role Mappings page, to review existing rules:
 - a. Search for a role mapping using one of the search fields. For example, to determine if a provisioning rule exists for a resource role, in the Resource Role field, enter the name of a resource role.
 - b. Click **Search**.

If a role provisioning rule exists for the resource role (either a predefined rule or a rule you created), it's displayed in the Search Results area.
 - c. To view or edit a provisioning rule, select the rule from the Search Results area.
 - d. In the Edit Role Mapping page, review the details for the rule.
- 3. To create a new provisioning rule, on the Manage Role Mappings page, click **Create**.
- 4. In the Create Role Mapping page, in the **Mapping Name** field, enter a name that identifies the mapping. For example, if you're creating a rule to provision a resource role you created called Digital Sales Manager, enter **Digital Sales Manager** for the mapping name too.
- 5. In the Conditions region, enter the conditions shown in this table:

Values to Enter in the Conditions Region

Field	Entry
Resource Role	Select the resource role you want to provision. For example, select Digital Sales Manager .
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.

- 6. In the Associated Roles region, click **Add** to add the job roles you want to provision.

For the Digital Sales Manager, for example, you might add the **Sales Manager** job role.

For internal sales users, add the **Resource** abstract role. Don't add this role for partner roles.
- 7. For each role you've added, select one or more of the role provisioning options shown in this table:

Role Provisioning Options

Role Provisioning Option	Description
Requestable	Qualifying users can provision the role to other users.
Self-Requestable	Qualifying users can request the role for themselves.
Autoprovision	Qualifying users get the role automatically.

Qualifying users are users who satisfy the rule conditions.

Note: **Autoprovision** is selected by default. Remember to deselect it if you don't want auto-provisioning.

- 8. Click **Save and Close**.
- 9. After creating or editing role mappings, run the scheduled process, Autoprovision Roles for All Users. This process compares all current user role assignments with all current role mappings and creates appropriate auto-provisioning requests.

Related Topics

- [How do I update existing setup data?](#)

What are the steps to provision a new, additional test environment?

Your newly provisioned, additional test environment should be provisioned like any other, similar to the production environment after it was provisioned.

Review the article, [Refreshing an Environment](#), to learn how to run self-service production-to-test (P2T) and test-to-test (T2T) refreshes for your Fusion Applications environments: .

Also see the article, [Oracle Applications Cloud Service Definition - Environment Refresh \(Doc ID 2015788.1\)](#), on My Oracle Support.

What are the privileges required to delete sales accounts and contacts?

Users with the sales administrator role can delete accounts and contacts.

Sales administrators can give privileges to the other administrative roles so that they can delete accounts and contacts. Here's a description of the privileges you must have:

Privileges Required to Delete Accounts and Contacts

Object	Privilege	More Information
Account	Delete Sales Party	You can't delete an account if it's a partner or competitor account, or if the account is the topmost tier in the account hierarchy.
Contact	Delete Sales Party Contact	You can delete standalone contacts. You must also have full access to all of the accounts associated with the contact. When you delete a contact, you remove the entire person record of the contact, including profile data, account usages, household memberships, and relationships to other accounts.

Note: When you delete an account or a contact, all the child entities might not become inactive. Run the Delete Child Entities of Inactive Party Records scheduled process to deactivate them.

Related Topics

- [What privilege do I need to create sales contacts?](#)
- [Why do I see references of deleted accounts?](#)
- [How do I edit job or abstract roles?](#)

How can I see all resource roles assigned to users?

You can export a list of resource roles assigned to employees/users in the application.

For steps, see [User and Role Access Audit Report](#).

How do I delete data using import management?

This topic shows how to delete data using import management

To delete data:

1. Create an import activity as described in the topic [How do I import data?](#)
2. Enter a name for your import.
3. In the **Object** drop-down list, select the Object.
4. Click **Advanced Options** and under the Import Options section, select **Delete** records from the Import Mode drop-down list. Click **Next**.
5. On the Map Fields page, map the source and target attributes.
6. Click **Next** to navigate to the Review and Submit page. Review the import activity configuration and click **Submit** to activate the import. You can view the status of the submitted import on the Manage Imports page.

Note: The identifier that you use to delete a record should be unique across the database.

Related Topics

- [How do I import data?](#)
- [Delete Attachments](#)
- [Delete Notes](#)
- [Delete Custom Object Data](#)

Can I search on untranslatable name fields that contain Chinese, Japanese and Korean characters?

Yes, using Adaptive Search, you can perform a search on untranslatable name fields such as Account Name or Contact Name that contain Chinese, Japanese and Korean characters.

You must change the parameter **Enable CJK Language Detection for Non-Translatable Fields** value from N to Y on the Parameters tab available in the Adaptive Search setup page. See [How do I edit Adaptive Search parameters?](#) for more information.

You can then follow these steps to enable specific text fields to support Chinese, Japanese and Korean languages:

1. Sign in with a user having Application Implementation Consultant role.
2. Go to the **Configure Adaptive Search** setup task.
3. Go to **Setup** tab and then **Advanced** subtab.
4. Select the required object.
5. Enable the **Enable CJK Language Support** check box for the fields on which you want this support. You can select up to 5 fields per object.
6. Do a Full or Partial Publish with the changed configuration.

How do I synchronize FCL fields with Opportunity contacts?

The opportunity contacts view object contains predefined predefined fixed choice list (FCL) fields of the contacts associated with the opportunity such as opportunity contact role code, affinity level code, influence level code, and so on. The FCL fields with SalesBuyingRoleCode, SalesAffinityCode, and SalesInfluenceLevelCode values have related predefined fields in the opportunity Contacts object called RoleCd, AffinityLvlCd and InfluenceLvlCd respectively.

These values get populated when the **Apply** button is clicked on the **Contacts** page before the user clicks the **OK** button. However, some of these related FCL fields aren't visible from the opportunity's Contacts sub tab. For example, a CFO could be the decision maker for an ERP opportunity but might be just a contributor for a CRM opportunity. To ensure that FCL fields get displayed, you must first create an opportunity with an associated contact and then add Before Update triggers to synchronize the FCL fields across objects from Opportunity Contacts.

Here are the steps to synchronize FCL fields with Opportunity Contacts:

1. Add the following opportunity contact object fields to the Contact sub tab from the Opportunity Details page.
 - RoleCd
 - AffinityLvlCd
 - InfluencedLvlCd
2. Create a Contact with the following related FCL fields:
 - SalesBuyingRoleCode
 - SalesAffinityCode

- SalesInfluenceLevelCode

3. Click **Apply**, then click **OK**.
4. Create an Opportunity and add the Contact you created in step 2.
5. Add the following Groovy code to Before Update in the Opportunity trigger.

- **Opportunity Contact to Account Contact**

```
def partyid = getAttribute('PERPartyId')

def vo = newView('Contact')
def vc = vo.createViewCriteria()
def vcr = vc.createRow()
def vcil = vcr.ensureCriteriaItem('ContactPartyId')
vcil.setOperator('=')
vcil.setValue(partyid)
vc.insertRow(vcr)
vo.appendViewCriteria(vc)
vo.executeQuery()

while(vo.hasNext())
{
    def curr = vo.next()
    curr.setAttribute('SalesBuyingRoleCode', RoleCd)
    curr.setAttribute('SalesAffinityCode', AffinityLvlCd)
    curr.setAttribute('SalesInfluenceLevelCode', InfluenceLvlCd)
}
```

- **Opportunity Contact to Contact**

```
def partyid = getAttribute('PERPartyId')

def vo = newView('PersonProfile')
def vc = vo.createViewCriteria()
def vcr = vc.createRow()
def vcil = vcr.ensureCriteriaItem('PartyId')
vcil.setOperator('=')
vcil.setValue(partyid)
vc.insertRow(vcr)
vo.appendViewCriteria(vc)
vo.executeQuery()

while(vo.hasNext())
{
    def curr = vo.next()
    curr.setAttribute('SalesBuyingRoleCode', RoleCd)
    curr.setAttribute('SalesAffinityCode', AffinityLvlCd)
}
```

- **Synchronize To Other Opportunity Contact**

```
def partyid = getAttribute('PERPartyId')

def vo = newView('OpportunityContactVO')
def vc = vo.createViewCriteria()
def vcr = vc.createRow()
def vcil = vcr.ensureCriteriaItem('PERPartyId')
vcil.setOperator('=')
vcil.setValue(partyid)
vc.insertRow(vcr)
vo.appendViewCriteria(vc)
vo.executeQuery()

while(vo.hasNext())
{
    def curr = vo.next()
    if(curr.getAttribute('OptyId1') != OptyId1){
        curr.setAttribute('RoleCd', RoleCd)
    }
}
```

```
curr.setAttribute('AffinityLvlCd', AffinityLvlCd)
curr.setAttribute('InfluenceLvlCd', InfluenceLvlCd)
}
```

6. Add more null checks if the triggers need to be used in Before Insert triggers.
7. Click **Save**.

Can I change the order of a sales stage associated with the Won status for my opportunity?

When you create a new sales stage from the Manage Sales Methods and Sales Stages task, you can adjust the Order column by entering a decimal number to insert 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. However, you shouldn't change the order of existing sales stages.

Note: 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.

What should I know about sales resources and multiple business units?

When your sales users work in business objects like opportunities and leads – and you're operating in a multiple-business-unit environment – the users' access to the data is based on their involvement in business artifacts.

Sales User Access to Transactional Data

Users get access to transactional data by:

- Inclusion in the Sales resource hierarchy
- Membership in a territory or sales team
- Being granted full access to the object

Thus, users can have access to data across many business units by their involvement in artifacts. Or, they could have access only to data in a single business unit (BU). It all depends on their membership. For example, a salesperson can have access to data via team and territory membership, irrespective of the BUs they're associated with in the resource hierarchy.

Business unit assignment can indirectly affect a user's access to object transactional data. In a multiple BU environment, BUs are available as territory dimensions and can be included as part of the territory coverage definition for the assignment of transactions. A sales user gains access to object data through territory membership. If BU is specified as

a territory dimension, then the user's access to data is limited to objects which, when they were created, were assigned to the same BU that's assigned to the user's territory team.

Sales Administrator Access to Business Units

Sales administrators, who are created as resources in the organization, have access to all the data available in the BUs to which they're associated.

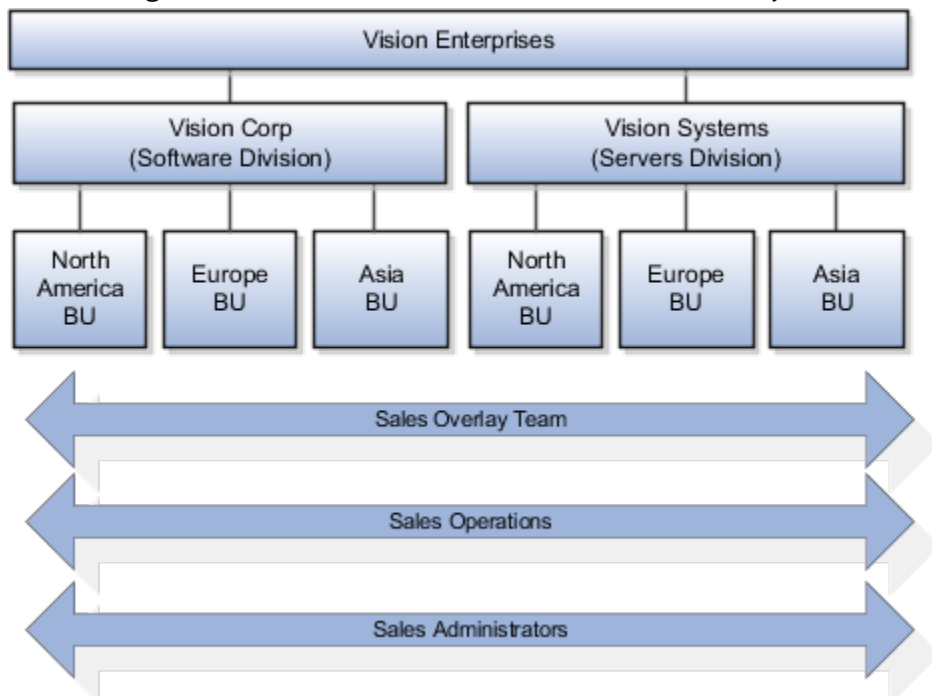
Use Case With Resources Across Business Units

Sometimes, you might want to have certain types of users have visibility into data across BUs. For example, you might want your overlay salespeople to have access to all BUs. Here are some examples:

- Associate overlay salespeople with all business units and differentiate them using territory dimensions, such as geographic region of responsibility.
- Associate sales operations and sales administrators to one, many, or all business units.

In the use case presented here, Vision Enterprises is a global high-technology company with two divisions: Vision Corp., focused on software, and Vision Systems, selling high-end servers and engineered systems that combine hardware and software in a single stack. Both divisions operate globally across North America, Europe, and Asia Pacific regions, so they create BUs for each of these areas.

The following figure shows the use case. The diagram shows Vision Enterprises as encompassing its two divisions, Vision Corp. and Vision Systems. The diagram shows the two divisions, Vision Corp. and Vision Systems, as each encompassing three BUs: North America, Europe, and Asia Pacific. The diagram shows the following types of users having access to all BUs under both divisions: sales overlay team, sales operations, and sales administrators.



Resource Organizations with Multiple Business Units

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

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

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

Related Topics

- [How do I restrict account records based on business unit?](#)

How are products synced between the inventory product master and sales?

The sync between the Oracle SCM Product Information Master (PIM) and Sales products is accomplished using scheduled processes.

These are the scheduled processes:

- Import Sales Products from PIM Data Hub
- Refresh Denormalized Product Catalog Table for BI

Import Sales Products from PIM Data Hub Scheduled Process

Run the Import Sales Products from PIM Data Hub process anytime you update or create products in the product model.

You must run this scheduled process so that products you created (or those you updated) in the Product Model show up in the sales Products UI.

Refresh Denormalized Product Catalog Table for BI Scheduled Process

Every time you publish a catalog, the scheduled process, Refresh Denormalized Product Catalog Table for BI, runs automatically to update the current view of the product group hierarchy in the applications.

In addition, each time you make a new assignment of Base to a root product group, you must run the process. If you don't run the process, your product group hierarchy might not appear in the applications.

Run the Processes

Here are the steps to run either process:

1. Sign in as a setup user and navigate to **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog window, click the down-arrow next to the **Name** field and click **Search**.
4. In the Search dialog window, search for the process you want to run.
5. Select the process in the results that are returned and click **OK**.
6. Click **OK** again, if needed.
7. In the Process Details window, click **Submit**.

What is the retention period for sales data?

There's no data purging or archiving for sales data related to sales objects like accounts, contacts, leads, opportunities, and custom objects.

How do I get the name of the product in an opportunity using Groovy?

ChildRevenue is the collection on the Opportunity object that tells you what products have been added to the respective opportunity. By taking the first record from that collection, you get either the Description or the Product Group Name, depending on the product type: product or product group.

Here's a sample script:

```
def a = ChildRevenue

if (a.hasNext()){

def b = a.first()

setAttribute('Name', Name + nvl(b.Description, b.ProdGroupName))

}
```

How do I get the badge in a custom panel to be the same color as a standard badge in Oracle Sales in the Redwood User Experience?

To get the badge in a custom panel to be the same color as a standard badge in Oracle Sales in the Redwood User Experience:

From panel card layout, create a template and use the following code to format the badge component:

```
<template id="Status_cBaseTemplate1">  
  <span class="oj-badge oj-form-control-default"><oj-bind-text value="[[ $value() ]]"></oj-bind-text></span>  
</template>
```

What do I need to do so I can report on a custom object in OTBI?

Before you can create reports on a custom object in Oracle Transactional Business Intelligence (OTBI), you must create a custom subject area. For example, you must create the custom subject area, so you can report on the opportunities related to that object.

For details on creating custom subject areas, see the *Configuring Applications Using Application Composer* guide, starting with this topic: [About Custom Subject Areas](#).

Why might I get an error when searching for leads?

When you select a predefined saved search when searching for leads, the search results display a list of the records as predefined in the saved search record sets. You can see the approximate number of items in each saved search, and you can control the number of lead record returned by setting lead search specific profile options.

Custom saved search can sometimes return an error. For example, if a required field, such as lead creation date, lead name, or lead number isn't specified as part of the saved search criteria, then you might receive an error. You should also check what values are set for the lead profile options, Lead Query Default Number of Days (MKL_LEAD_SEARCH_CREATION_RANGE_DEFAULT), and Lead Query Maximum Number of Days (MKL_LEAD_QUERY_IN_N_DAYS) for your environment.

This table lists the profile options that manage how sales lead searches are performed.

Lead Search Profile Options

Profile Option Display Name	Default Value	Effect
Lead Query Maximum Number of Days (MKL_LEAD_QUERY_IN_N_DAYS)	360	Specify the maximum number of days allowed when searching leads based on the creation date range. The value for the maximum number of days must be a positive number. If the value isn't a positive number or left blank, the value of 360 days is used.
Lead Query Default Number of Days (MKL_LEAD_SEARCH_CREATION_RANGE_DEFAULT)	90	Specify the default number of days used to derive the creation date range for searching leads. The search criterion is derived by using the current date for the creation end date value and the profile option to derive the creation start date value. For example, if you want leads for the last 15 days to be the default query action, then set the profile value to 15. The default creation date search criteria will have an end date for the current date and the start date will be 15 days prior to the current date. The values can be overridden in the search criteria. The value for the default number of days must be a positive number. If the value isn't a positive number or left blank, the value of 30 days is used. This profile option can be defined at both the site and user levels.
Lead Query Warning Threshold Number of Days (MKL_LEAD_SEARCH_CREATION_RANGE_RECOMMENDED)	180	Specify the number of days for the lead creation date search criteria before issuing an alert to the user. To disable the warning, delete the profile option value.
Lead Search Context-Based Data Security Enabled (MKL_LEAD_CDS_ENABLED)	N	Enable context-based data security policies for improved performance of lead search. The default value is set to N. Note: If you enable this option, then you must also ensure that the filters in the Lead Overview page, such as My Leads, My Subordinate Leads and so on have the required access in Security Console. Otherwise, your lead data search won't return expected results.

Profile Option Display Name	Default Value	Effect
Require Additional Criteria for Lead Search Enabled (MKL_SRCH_ADDL_CRITERIA_REQD)	N	Enable additional search criteria, other than creation date, when searching across all leads, or for searches relying on hierarchy rollups.

See [How do I create and manage saved searches in classic Oracle Sales?](#) for more information about creating and managing saved searches.

How do I see information about updates and maintenance in sales?

Use the My Cloud Console to monitor the notifications that Oracle sends about these events.

Once you're in the portal, use the menu to filter and sort specific notifications based on different cloud services and categories.

In the Notification Preferences tab, you can also configure notification preferences.

Administrators – who get notification emails regardless of whether they access the portal – can set up nonadministrative users to get notifications based on applications and pods.

See this Oracle Learning training on YouTube for more information: [Where Do I Manage My Cloud Services?](#).

Related Topics

- [Where can I find the 2025 release schedule for Sales?](#)

How do I restrict account records based on business unit?

Create a custom role that restricts access to accounts, and then create an access group to grant access to members of the group based on business units.

Note that access groups don't restrict access. Rather, they give access based on conditions in rules.

Related Topics

- [How do I create membership rules for custom access groups?](#)
- [How do I enable team-based access to custom objects when using access groups?](#)

How do I set up activity notifications?

You can configure company-level and user-level notifications for activities. You also can set the default appointment reminder, and the default appointment duration, calendar view, and calendar start time.

Company-Level Notifications

For the entire company, you can specify whether users:

- Receive notifications as owners of an activity
- Receive notifications if they aren't the owners of an activity
- Receive task notifications if changes are made to completed tasks

For both appointments and tasks, you can specify:

- Whether users receive email notifications
- Whether users receive notification messages in the notifications list

Note: If you enable email notifications at the company level, each individual user can still choose not to receive email notifications. If you enable notifications in the notifications list, each individual user can still choose not to receive notifications in the notification list.

Here are the profile options for setting up company-level activity notifications:

Profile Option Name and Code	Default Value	Description
Task Notification to Contacts and Consumer Customers Enabled ZMM_ACTIVITY_TASKS_EXTERNAL_NOTIFICATION	No	Enables notifications to external participants when tasks are created, updated, or deleted
Appointment Notification to Contacts and Consumer Customers Enabled ZMM_ACTIVITY_EXTERNAL_NOTIFICATION	Yes	Enables notifications to external participants when appointments are created, updated, or deleted
Disable Appointment E-Mail Notification ZMM_ACTIVITY_DISABLE_EMAIL_APPT_NOTIF	No	Specifies whether to disable appointment email notifications
Disable Task E-Mail Notification ZMM_ACTIVITY_DISABLE_EMAIL_TASK_NOTIF	No	Specifies whether to disable task email notifications
Disable Task Notification List ZMM_ACTIVITY_DISABLE_LIST_TASK_NOTIF	No	Specifies whether to disable task notifications in the notifications list

Profile Option Name and Code	Default Value	Description
Disable Appointment Notification List ZMM_ACTIVITY_DISABLE_LIST_APPT_NOTIF	No	Specifies whether to disable appointment notifications in the notifications list

User-Level Notifications

You can set several profile options at the user level to control the behavior of notifications. The user preferences setting are stored in the profile options. Users can change their notification preferences in the Set Preferences pages, accessible after clicking their user names or image in the global header.

Here are the user-level profile options for activity notification preferences:

Profile Option Name and Code	Default Value	Description
Appointment Owner Notifications ZMM_ACTIVITY_APPT_NOTIF_OWNER	No	Enables receiving appointment notifications when the user is the owner of the appointment
Appointment Resource Notifications ZMM_ACTIVITY_APPT_NOTIF_RESOURCE	Yes	Enables receiving appointment notifications when the user is a resource or invitee of the appointment
Task Owner Notifications ZMM_ACTIVITY_TASK_NOTIF_OWNER	No	Enables receiving task notifications when the user is the owner of the task
Task Resource Notifications ZMM_ACTIVITY_TASK_NOTIF_RESOURCE	Yes	Enables receiving task notifications when the user is a resource on the task
Task Notifications For Completed Tasks ZMM_ACTIVITY_TASK_NOTIF_PAST	No	Enables receiving task notifications for tasks that have already been completed
Notification List Appointment Notifications Enabled ZMM_ACTIVITY_APPT_NOTIF_LIST	Yes	Enables receiving appointment notifications in the notifications list
Email and List Appointment Notifications Enabled ZMM_ACTIVITY_APPT_NOTIFICATIONS	NA	Enables receiving appointment notifications in the notifications list and through email
Notification List Appointment Notifications Enabled ZMM_ACTIVITY_APPT_NOTIF_LIST	Y	Enables receiving appointment notifications in the notifications list

Profile Option Name and Code	Default Value	Description
E-Mail Task Notifications Enabled ZMM_ACTIVITY_TASK_NOTIF_EMAIL	Y	Enables receiving task notifications by email
E-Mail Appointment Reminders Enabled ZMM_ACTIVITY_EMAIL_REMINDER	Y	Enables receiving appointment reminders by email notifications
Notification List Appointment Reminders Enabled ZMM_ACTIVITY_NOTIFICATION_LIST_REMINDER	N	Enables receiving appointment reminders in the notifications list
Owner Initiated Task Notifications Enabled ZMM_ACTIVITY_APPT_NOTIF_OWNER_INITIATED	N	Enables receiving task notifications when a user creates, updates, or deletes a task and he's the owner of the task
Owner Initiated Appointment Notifications Enabled	N	Enables receiving appointment notifications when a user creates, updates, or deletes an appointment and she's the owner of the appointment

How to Disable Notifications for the Entire Company

You can disable activity notifications globally, so that no one in the company receives notifications. To disable notifications:

1. In the Setup and Maintenance area, go to:
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o Task: Manage Administrator Profile Values
2. Enter the profile option to disable email or appointment notification, in the Profile Option Code field. Here the items you can disable and the profile options you use to disable them, company-wide:

What to Disable	Profile Option
Appointment email notification	ZMM_ACTIVITY_DISABLE_EMAIL_APPT_NOTIF
Task email notification	ZMM_ACTIVITY_DISABLE_EMAIL_TASK_NOTIF
Appointment notification in the notification list	ZMM_ACTIVITY_DISABLE_LIST_APPT_NOTIF

What to Disable	Profile Option
Task notification in the notification list	ZMM_ACTIVITY_DISABLE_LIST_TASK_NOTIF

- For each item you're disabling, change the related site-level profile value to Yes.

Related Topics

- [How do I set up Activities for Oracle Sales in the Redwood User Experience?](#)
- [How can I send reminders to an activity owner until the activity is completed?](#)

What is the impact of the ORA_HZ_INCLUDE_REGIONAL_COUNTRY profile option?

The ORA_HZ_INCLUDE_REGIONAL_COUNTRY profile option is used to specify if the local country name must be displayed in an address.

Enable address format functions to include regional country. You must use this profile option to specify if the local country name must be displayed in an address. The profile option works only when the user profile you're signed in as in the User Preference option is assigned a territory. For example if 'US' is the selected territory then all addresses that have country as US will not show country as US in the formatted address field by default. You can then use this profile option to display the address. Mark the profile value as Y to show the country in the formatted address. This setting is used while displaying read-only formatted address in the application pages.

How do I access my LinkedIn Profile?

You can use the 'Show LinkedIn Profile' smart action under Contact object.

This smart action isn't enabled in the predefined application. You must enable this smart action first, and then use the action from Contact foldout page to navigate to LinkedIn Sales Navigator.

To do this:

- Navigate to **Application Composer > Smart Actions** and search LinkedIn.
- Select the Show LinkedIn Profile row for the Contact object
- Select Yes under the **Enabled** column.

The LinkedIn smart option for Contacts is now enabled. To view the LinkedIn profile of a contact:

- Go to **Contacts** and drill down to a contact.
- Search **Show LinkedIn Profile** in the search action bar.

How can I report on Sales non-revenue overlay credit in OTBI?

Use the Sales - CRM Pipeline subject area to create non-revenue credit reports in Oracle Transactional Intelligence (OTBI) reports. The **Facts > Pipeline Detail Facts** folder includes attributes such as Open Opportunity Line Non-Revenue Credits, Closed Opportunity Line Non-Revenue Credits, Closed Opportunity Line Non-Revenue Credits YTD, and Closed Opportunity Line Non-Revenue Credits QTD.

How can I create a report on account change history?

While there's no Oracle Transactional Business Intelligence (OTBI) subject area for creating reports on changes to account data and other Oracle Fusion application objects, you can track changes using the Audit feature.

1. In the Setup and Maintenance work area, search for and open the **Manage Audit Policies** task.
2. On the Manage Audit Policies page, go to the Oracle Fusion Applications section and click **Configure Business Object Attributes**.
3. On the Configure Business Object Attributes page, click **Product** and select the product area that you want to audit. To audit accounts, select the **Common CRM** object.
4. Open the Customer section to view the categories of attributes related to accounts and select the ones you want to audit.
If no attribute is listed for the category, use the **Add** (plus sign) icon to add attributes from the Select and Add Audit Attributes pane.
5. After you select all the required objects and their attributes, click **Save and Close**. You return to the Manage Audit Policies page.
6. In the Oracle Fusion Applications section, click the **Audit Level** list and select **Auditing**. This setting turns on the auditing functionality.
7. Click **Save and Close**.

You can view audit reports by clicking on **Navigator > Tools > Audit Reports**. For details, see the topic [View Audit Reports](#) in the Using Common Features guide.

For steps to set up all Sales objects, see [Enable Auditing of Sales Business Objects](#).

Related Topics

- [What fields can I audit for Sales?](#)
- [Can I see change history for Oracle Sales in the Redwood User Experience?](#)
- [How do I view audit reports?](#)
- [Enable Auditing of Sales Business Objects](#)

Can I get a report on Sales scheduled processes using an SQL query?

Yes, you can query the following application tables to create a report on scheduled (ESS) processes: FUSION_ORA_ESS.REQUEST_HISTORY and FUSION_ORA_ESS.REQUEST_PROPERTY.

Does the Microsoft 365 add-in for Oracle Sales in the Redwood User Experience support integration with on-premises Microsoft Exchange Server?

No, the Microsoft 365 add-in for Oracle Sales in the Redwood User Experience supports only the cloud version of Microsoft Exchange Server.

How do I get audit logs for administrator-related activities in sales?

You might want to see administrator-related changes periodically. For example, you might want to know who changed a user role configuration and when they changed it. Or, you might want to see the sales territory change history. You have a few of options for getting historical information about changes that an administrator has made in the applications.

Here are the options:

- *Oracle Platform Security Services (OPSS) audit*
- *User details reports*
- *Sales objects change history audit*

Oracle Platform Security Services (OPSS) Audit

The Oracle Platform Security Services (OPSS) audit records changes made from Fusion Applications user and role management screens, including the Security Console.

Here's how you enable the auditing:

1. Sign in to the application and navigate to Setup and Maintenance.
2. Search for the task, Manage Audit Policies.
3. In the Manage Audit Policies page, in the Oracle Platform Security Services section, set the **Audit Level** to Low.
4. Save the changes.

Here's how to see the audit reports:

1. Sign in to the applications as a user with the Application Implementation Consultant role (or Internal Auditor role).
2. In the Navigator, select **Tools > Audit Reports**.
3. Enter your search conditions. For example enter the date you think the changes might have happened.

If you select **Show Attribute Details**, you can filter by more attributes.

4. Set the **Product** to Oracle Platform Security Services.
5. Select the **Event Type**, for example, App Role Creation, Role Membership Add, or Role Membership Remove.
6. Click **Search**.

Here are some tips for understanding the search results:

- For the event types, Role Membership Add or Role Membership Remove, when users or roles are the subject being added or removed, you can look for the event types, Role Membership Remove or Role Membership Add, and the attribute, Enterprise Roles. This will find the subject being added or removed.
- When a function security policy or privilege is added or removed, you can filter them in the UI and look for the event types, Permission Set Revocation or Permission Set Grant, and the attribute, Permission Set Name. This will find the policy or privilege that was removed or added.
- You might see create_by or update_by to be FUSION_APPS_HCM_ESS_APPID or FUSION_APPS_HCM_SOA_APPID.

FUSION_APPS_HCM_ESS_APPID refers to an operation done through a scheduled process.

FUSION_APPS_HCM_SOA_APPID refers to the operation done by an internal HCM web service call. For an example, see the My Oracle Support article, *PER_EMAIL_ADDRESSES last updated by is showing as user FUSION_APPS_HCM_SOA_APPID (Doc ID 2661575.1)*.

For more information on the Oracle Platform Security Services Audit Framework see *Introduction to Oracle Fusion Middleware Audit Framework*.

User Details Reports

Several options are available for viewing information about users in Oracle Fusion Applications.

- **User and Role Access Audit Report:** This report gives details of the function and data security privileges granted to specified users or roles. This information is the same as the information that you can see for a user or role on the Security Console.
- **User Role Membership Report:** This report lists role memberships for specific users. It includes user name, first and last names, user status, department, location, and role memberships.
- **Inactive Users Report:** Run as a scheduled process, this report helps identify users who haven't signed in for a certain period of time.
- **User Details System Extract Report:** This report shows details of Oracle Fusion Applications user accounts. It gives user details like business unit name, last record update information, worker type, organizations, managers, and more.

For more details, see the Role Provisioning, Role Assignments, and Role Configuration and the Reporting on Application Users and Roles chapters in the *Oracle Fusion Cloud Applications: Securing Applications* guide.

Sales Objects Change History Audit

You can see the change history for many Sales objects using the audit feature of Sales. Auditing is available for objects like accounts and contacts, activities, contracts, opportunities, leads, the sales catalog, territories, and more. See the topic, *What fields can I audit for Sales?*, for more information.

Are activity notes available in Oracle Sales in the Redwood User Experience?

Yes. Starting with Update 24B, you can enter and view notes on tasks and appointments in Oracle Sales in the Redwood User Experience. There's a separate section for notes on each activity. Interactions don't have a separate notes section. For interactions, you take notes directly in the interaction itself.

Here's a screenshot of a task highlighting the Notes section.

My Open Tasks

Status (3) X Activity

2 Results

Subject

☐ Send Introduction for Routing

☐ Send Introduction Email

Edit Task

Associate to

Account ... Lead - Related Sales Leads ...

Opportunity - Related Opportunities ...

> Related Activities and Interactions

> Assignees +

> Contacts +

▼ Notes +

Title	Author	Actions
Customer is high priority	George White	...

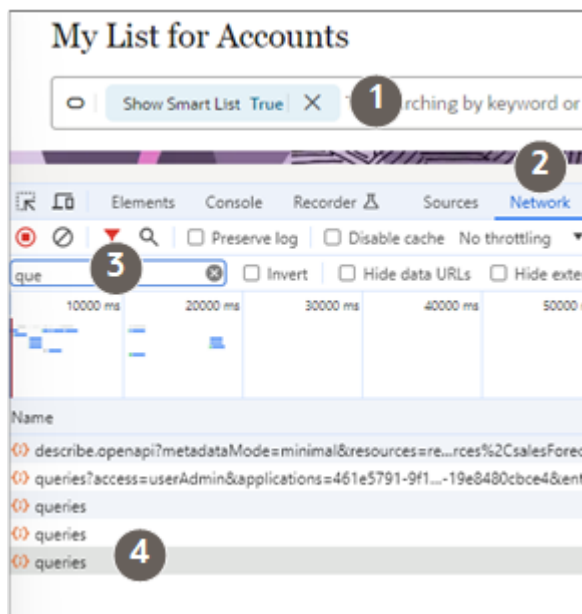
The notes you take in activities don't appear in the list of activities (the activity stream) for the record the note is associated with. For example, if you enter a note for an account appointment, then that note doesn't show up in the list of activities for that account. It's only visible in the appointment itself.

How can I find the UUIDs for a saved search and the IDs for its filters in Oracle Sales in the Redwood User Experience?

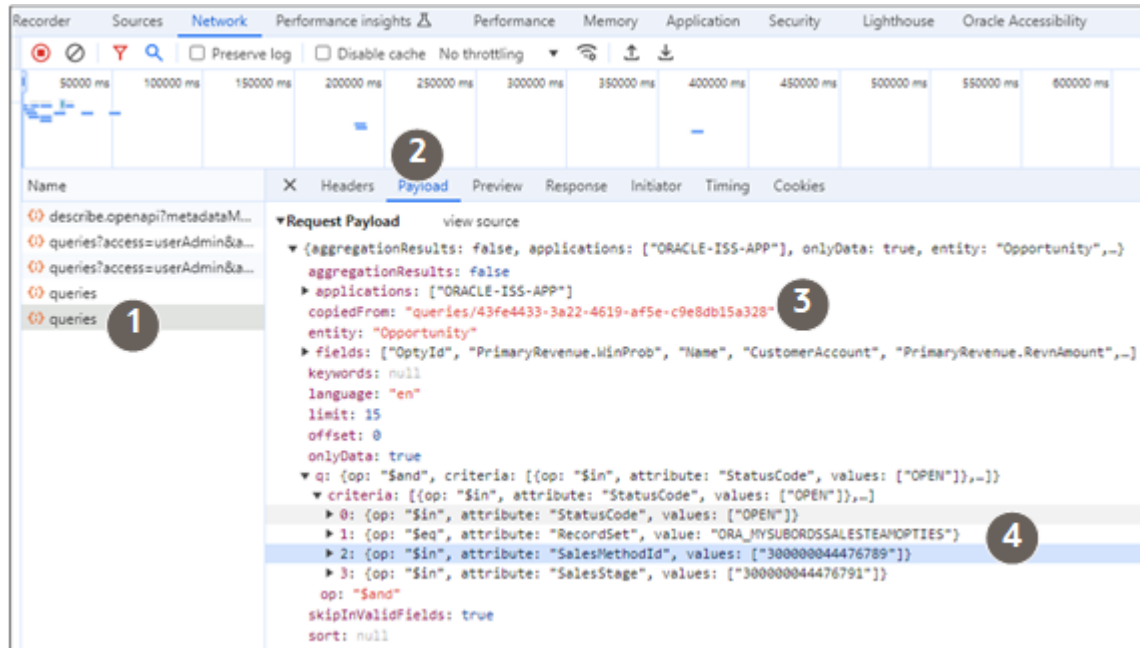
Here's how to find the Universally Unique Identifier (UUID) for a saved search and the various IDs of its query parameters in Oracle Sales in the Redwood User Experience. The IDs are required to reference the saved search and filter parameters in Sales Dashboard layouts, including metric cards and tabular and list views. The IDs are also used in Oracle Transactional Business Intelligence analyses. You'll need an ID to filter by opportunity sales method and sales stage, for example. A UUID is a 36-character alphanumeric string that can be used to identify information, such as rows of data within a database table.

Here's how to find the UUID for a saved search:

1. Open the list page of the object in the Chrome browser. For example, if you need the UUID for accounts, for example, click **Accounts** on the home page.
2. Click in the action bar (callout 1 in the following screenshot) and select any saved search other than the one you're looking for.
3. Right-click the page and select **Inspect** from the Chrome browser menu.
4. Click the **Network** tab (callout 2).
5. Reload the browser page.
6. In the action bar, switch to the saved search you want.
7. Click the **Network** tab again.
8. Enter **que** in the filter field to filter out the queries (callout 3).
9. Select the last **queries** entry in the list (callout 4).



10. With the last queries item selected (callout 1 in the following screenshot), click the **Payload** tab (callout 2).
11. The UUID is the string of characters following **queries/** in the **copiedFrom:** line. For example:
934fb7ec-658f-4718-b38c-95f8f5e6c431 (highlighted by callout 3).



12. To view the IDs of the query parameters, open the **q**: list (callout 4). For example, here's a sample sales method ID: `{op: "$in", attribute: "SalesMethodId", values: ["300000044476789"]}`

How can I give access to non-administrator users to edit certain objects?

By default, standard user roles might not have permissions to edit certain objects that administrators can access and edit. You can use access groups to give these users permissions to Sales objects.

For example, a salesperson or sales manager, by default, might not be able to edit addresses for contacts. You can set up an access group to give these users the ability to edit and delete addresses.

Related Topics

- [How do I create and manage access groups?](#)
- [How do I configure real-time and near real-time access for access group object records?](#)
- [How do I create membership rules for custom access groups?](#)
- [How do I enable team-based access to custom objects when using access groups?](#)

How do I create and manage access groups?

You can use access groups to give sales resources more data permissions, beyond the access provided by the supplied data security policies. You can also use them to restrict data to sets of users.

Note: You must be assigned the IT Security Manager job role or the Sales Administrator job role to create and manage access groups.

Create an Access Group

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

1. Sign in to the application as the sales administrator or as a setup user.

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

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

Here's how the UI is mapped to the two roles mentioned here:

- The Sales Administrator job role sees the Access Groups page in the Sales and Service Access Management work area.
- The IT Security Manager job role sees the Sales and Service Access Management main page and uses the Configure Groups tab to display the Access Groups page.

3. Click **Create**.
4. In the Create Access Group page, enter the group name and make sure the Active checkbox is checked.
5. Save your new group.

Create Object Sharing Rules for the Group

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

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

For example, you might specify that group members have access to opportunity records that have a Status attribute equal to Open.

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

For more rules that you create, this step isn't required. You only need to publish the rule once as described earlier in this procedure.

10. Now run the Perform Object Sharing Rule Assignment Processing scheduled process to ensure that the object sharing rules for each object are assigned properly.

Add Members to the Group

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

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

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

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

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

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

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

Edit Access Groups

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

Here's how to edit access groups:

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

Custom access groups show by default. But, to see predefined access groups, select **System Groups - Role** from the **List** drop-down list.

3. What you can do depends on whether you're editing a user-defined or a predefined group.
 - Predefined groups:

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

- User-defined (custom) groups:

For custom groups, you can:

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

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

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

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

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

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

The rule is deleted for the group you're editing, but not for any other groups that the rule is associated with.

- o Add a preexisting rule to the access group. Click **Add Rule**, and then, in the search dialog box, search for and select the rule you want to add.
- o Create a new rule for the access group. Click **Create Rule**, and then define the new rule in the Create Object Sharing Rule page.
- o Change the access level provided by the rule for this group by selecting a new value from the rule's **Access Level** drop-down list.

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

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

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

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

If you select an existing rule to edit, the Access Group: Edit Group Membership Rule page appears, where you can edit or delete any of the rule details.

6. When you're finished editing the group details, click **Save and Close**.

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

Delete a Custom Access Group

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

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

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

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

3. In the confirmation dialog, click **Yes** to confirm your choice.

The group is deleted and is no longer available on the Access Groups page.

Related Topics

- [How do I create membership rules for custom access groups?](#)
- [How do I run the Perform Object Sharing Rule Assignment Scheduled Process?](#)
- [How do I configure real-time and near real-time access for access group object records?](#)
- [Can I rename a custom role in an access group?](#)
- [Review a Role's Access to Object Data](#)

Why are my accounts created in Sales appearing in Accounts Receivable?

By default, when accounts are created in Sales, they're synced to Accounts Receivable.

All accounts created in Sales appear in the Manage Customers page in Accounts Receivable. The reason is, the usage added when you create an account from Sales is CUSTOMER SALES_ACCOUNT. The Accounts Receivable UI (Manage Customers page) shows party records with CUSTOMER usage. As shipped, there's no way to prevent this behavior.

Related Topics

- [Can I sync my Financials accounts with Sales?](#)
- [How do I allow the update of sales contacts while protecting ERP contacts from being edited?](#)

How do I capture and claim expenses in Partner Relationship Management?

You can capture and claim marketing expenses in Partner Relationship Management using the Marketing Development Funds functionality. Here's how you can go about it:

- **MDF Budgets:** Create and manage MDF budgets that you can use to track funds used for channel marketing activities that your partners carry out. You can also create budgets exclusively for a specific partner, and manage fund requests and claims associated with the marketing budget.

- **MDF Requests:** You can use this functionality to request funds, which can be allocated from marketing budgets, to implement strategic marketing activities.
- **MDF Claims:** You can use this functionality to submit claims seeking reimbursement for the marketing expense incurred. It helps you track the progress of claims from submission to payment. You can approve, reject, return, or withdraw a claim as required. You can also view all the claims submitted by partner users or create and submit claims against any approved request yourself on behalf of a partner.
- **MDF Claim Settlements:** You can track the progress of your claim payment and capture your claim payment information.

How do I resolve the MKL-315105 error, which I get while trying to add team members?

You might get the error, "You can't add a resource to the deal registration sales team because the resource is outside of your partner organization. (MKL-315105)" if the approvers belong to internal sales rather than the partner organization.

You can resolve this error by setting the `AllowInternalResource` attribute to `true` in your before-update trigger. For example:

```
newRecord.setAttribute("AllowInternalResource", true);
```

Can I delete deal registration records?

You can't delete deal registration records because delete action is not supported in deal registrations.

However, you can change the status of these deals to `ORA_FAILED` for such records.

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

Object	Criteria
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 prior 180 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

Field	What to Enter
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.

Where can I find the country ISO format used in Oracle CX?

The ISO format for countries is stored in the FND_TERRITORIES_B table. As predefined data, it can't be changed.

You can get more information on this table in the *Oracle Fusion Cloud Applications: Tables and Views for Common Features* guide.

Can I prevent users from deleting attachments?

By default, attachments take their edit rights from their parent object. Thus, if an object record is read-only, without customization, attachments should be read-only as well.

Keep in mind that an attachment is considered to be a normalized field on an object, so if users can update the object (as in, update any field), then they can also update the attachments on the object.

Can I create a document approval process using Oracle Integration and Oracle Content Management?

Yes. You might need several users to review and approve documents related to a sales process, such as documents related to the processing and approval of a loan.

You can create a document approval process by creating an integration using Oracle Integration and Oracle Content Management. Read this guide for more information: [Create a document approval process in Oracle Sales Cloud](#).

How can I mask data in an environment?

To have an environment created with the data masked, create a service request using the Production to Test (P2T) template. Before you submit the request, be sure you select the Data Mask check box.

How can I mask data in an environment? To have the data in an existing nonproduction environment masked, create a standard service request. Enter the following as the service request title: Data Mask for Environment:

`Name_of_The_Environment_To_Mask`

Can I change the default activity notification email text?

While you can't change the email content for activity notifications, you can create your own email templates and then disable the supplied activity notifications.

Here are the high-level steps:

1. Create your own object workflows and email templates. See: [About Email Notifications](#)
2. Disable the supplied activity notifications using profile option settings. See: [How do I set up activity notifications?](#)

Related Topics

- [How can I send reminders to an activity owner until the activity is completed?](#)

Can I use the Oracle ERP Cloud Adapter to integrate Sales and ERP?

The Oracle ERP Cloud Adapter lets you create an integration with Oracle Enterprise Resource Planning (ERP) applications.

See this content for more details: [Oracle ERP Cloud Adapter Capabilities](#).

How can I see attachment upload dates?

To get upload dates for attachments to show in the UI, set the profile option, Attachment Component Basic Enabled (ZCA_ATTACHMENT_ENABLE_BASIC), to No.

How do I enable Adaptive Intelligence features for Sales?

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. You need to complete the onboarding steps for Intelligence in Sales and then set up the connection to AI Apps for Sales.

You then must configure specific features based on what features you're using. You can enable the Sales Intelligence features provided by Oracle from the Setup and Maintenance work area as follows.

1. In Setup and Maintenance, open the **Enable Sales Intelligence** task:
 - o Offering: Sales
 - o Functional Area: Intelligence in Sales
 - o 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 identify if you've 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'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.

Next, you must set up the connection to AI Apps for Sales and import data into AI Apps for Sales from Oracle CX Sales using basic manual steps and configuration.

Connect AI Apps for Sales to CX Sales and Import Sales Data

If you've sufficient 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 if you want 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 may result in corrupt predictions.

5. After you set up the connection, click **Activate** to enable all the selected features.

Data ingestion starts immediately.

After a successful connection, the application can access and import data from Oracle CX Sales.

How do I exclude participants that are end-dated on compensation plan while running the calculation process?

Here's how you can exclude an end-dated participant on compensation plan:

1. Run Deploy Compensation Plans.
2. Run Calculation Process to remove participants from the compensation plan.

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.

How do I use an Intelligent Advisor interview in Sales and Fusion Service?

Oracle Intelligent Advisor (previously known as Oracle Policy Automation) can be connected to Oracle Sales and Fusion Service for use by agents/employees, customers or both.

Intelligent Advisor interviews can be used for:

- Service requests across a range of industries
- Knowledge streaming by helping agents and contacts identify the most appropriate knowledge article or advice for their needs
- Any multi-page information gathering in Oracle Visual Builder
- Personalized self-service advice with Oracle Sales and Fusion Service

Data can be loaded from Oracle Sales and Fusion Service into the interview and saved back to Oracle Sales and Fusion Service when the interview is submitted.

For more information, see *Overview of integrating with Oracle Sales and Fusion Service*.

Related Topics

- [How do I send a signature captured in an Intelligent Advisor form to Sales?](#)

How do I send a signature captured in an Intelligent Advisor form to Sales?

You can send the captured signature from a form in Intelligent Advisor and create it in Oracle Sales as an attached file (PDF) in a custom object.

Here's how to do that:

1. Create an Intelligent Advisor interview that's *data mapped to Oracle Sales and Fusion Service*.

2. Create an *RTF template for a form* and *insert a signature* into the template.
3. Configure the interview to *save the generated form to the connected application*. Make sure the *output format is PDF*.

Related Topics

- [How do I use an Intelligent Advisor interview in Sales and Fusion Service?](#)

What does the Apply Hold action mean on contracts?

Apply Hold on a contract line changes the status of the contract to Hold. A Hold status signals the Update Contract Status process to ignore the lines. Further, lines on hold aren't changed to Expired status.

Some of the actions available for a contract and associated lines have no effect on the status of the contract. These actions are:

- **Preview:** Displays contract and lines with terms and conditions in PDF format.
- **Validate:** Displays errors and warnings, if any.
- **Duplicate:** Creates a new line in Draft status with a new number for which you can select to retain contract line information from the original line.
- **Delete:** Removes the line. You can only remove contract lines when they're in the draft status.

Note: Statuses are predefined and you can't define new statuses. However, you can define user statuses and their transitions and use them, for example, to pass the contract from one team to another for review before submitting the contract for approval.

Contract Line Statuses and Allowed Actions

This table shows the available contract line statuses and lists the allowed actions for each status that cause a change in the line status:

Status	Description	Available Actions and Resulting Statuses
Active	The initial status of a line.	• Apply Hold Resulting status: Hold • Close (Terminate) Resulting status: Closed
Hold	The status of a line changes to Hold when a hold is applied. The Update Contract Status process ignores contract lines on hold and doesn't change them to Expired.	• Remove Hold Resulting status: Active, if before end date. Otherwise, the status is Expired. • Close (Terminate) Resulting status: Closed
Expired	The status of a line changes to Expired when its end date is reached.	• Apply Hold

Status	Description	Available Actions and Resulting Statuses
		Resulting status: Hold • Close Resulting status: Closed

What are the standalone data security predicates predefined for Contacts?

Data security predicates provide access to object data, the access type, and the data to be accessed. This topic lists the standalone data security predicates predefined for the Contact business object and the contact data to be accessed can be All, a specific contact record, or a subset of the contact data.

The instance set defines the subset of data that limits the condition part of the data resource. For more information, see the Manage Database Resources section of the Securing CX Sales and Fusion Service guide.

This table lists the instance set name and associated description for the Contact business object:

Instance Set Name	Instance Set Description	Required Instance Name
HZPARTIESHZ196	Access the trading community person for table HZ_PARTIES for all people in the enterprise (1=1). Ensure that View Sales Party action is enabled.	• View Sales Party • Read
HZPARTIESHZ198	Access the trading community person for table HZ_PARTIES for their trading community person record.	• View Sales Party • Read
HZPARTIESHZ199	Access the trading community person for table HZ_PARTIES for all persons who are a member of their partner organization.	• View Sales Party • Read
HZPARTIESZBS100105	Access the sales party for table HZ_PARTIES where they're in the management chain of the account owner.	• View Sales Party • Read
HZPARTIESZBS100106	Access the sales party for table HZ_PARTIES where they're the account owner.	• View Sales Party • Read
HZPARTIESZBS100108	Access the sales party for table HZ_PARTIES for all customer contacts where they're in the management chain of a resource who's on the account team of at least one related account.	• View Sales Party • Read

Instance Set Name	Instance Set Description	Required Instance Name
HZPARTIESZBS100116	Access the sales party for table HZ_PARTIES for all customer contacts where they're a member of a territory associated with at least one related account.	- View Sales Party - Read
HZPARTIESZBS100118	Access the sales party for table HZ_PARTIES for all customer contacts where they're a member of an ancestor territory to a territory associated with at least one related account.	- View Sales Party - Read
HZPARTIESZBS100119	Access the sales party for table HZ_PARTIES for all customer contacts where they're in the management chain of a resource who's on the account team of at least one related account with full access.	- View Sales Party - Read
HZPARTIESZBS100120	Access the sales party for table HZ_PARTIES for all customer contacts where they're in the management chain of a resource who's on the account team of at least one related account with edit access.	- View Sales Party - Read
HZPARTIESZCM1	Access the sales party for table HZ_PARTIES where user is in the sales account team.	- View Sales Party - Read
HZPARTIESZCM133	Access the sales party for table HZ_PARTIES for all prospects in the enterprise.	- View Sales Party - Read
HZPARTIESZCM134	Access the sales party for table HZ_PARTIES for all customers in the enterprise.	- View Sales Party - Read
HZPARTIESZCM169	Access the sales party for table HZ_PARTIES for all customer contacts where they're in the account team of at least one related account with edit access.	- View Sales Party - Read
HZPARTIESZCM170	Access the sales party for table HZ_PARTIES for all customer contacts where they're in the account team of at least one related account with full access.	- View Sales Party - Read
HZPARTIESZCM173	Access the sales party for table HZ_PARTIES for all customer contacts where they're in the account team of at least one related account.	- View Sales Party - Read
HZPARTIESZCM3	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who's on the sales account team.	- View Sales Party - Read

Instance Set Name	Instance Set Description	Required Instance Name
HZPARTIESZCM39	Access the sales party for table HZ_PARTIES where user is a member of the territory associated with the sales account.	- View Sales Party - Read
HZPARTIESZCM4	Access the sales party for table HZ_PARTIES where user is in the sales account team with edit access.	- View Sales Party - Read
HZPARTIESZCM40	Access the sales party for table HZ_PARTIES where user is a member of the territory that's an ancestor of the territory associated with the sales account.	- View Sales Party - Read
HZPARTIESZCM44	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who's on the sales account team with edit access.	- View Sales Party - Read
HZPARTIESZCM45	Access the sales party for table HZ_PARTIES where user is in the sales account team with full access.	- View Sales Party - Read
HZPARTIESZCM46	Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who's on the sales account team with full access.	- View Sales Party - Read
HZPARTIESZCM51	Access the sales party for table HZ_PARTIES where user is the owner of the territory associated with the sales account.	- View Sales Party - Read
HZPARTIESZCM52	Access the sales party for table HZ_PARTIES where user is the owner of the territory that's an ancestor of the territory associated with the sales account.	- View Sales Party - Read
HZPARTIESZCM158	Access the Contacts with one party usage.	- View Sales Party - Read
HZPARTIESZCM415	Access the Contacts which aren't created by Partner User.	- View Sales Party - Read
HZPARTIESZCA99972	Access the Contacts where they're in access groups.	- View Sales Party - Read

Can I change Digital Assistant greeting messages and prompts?

Yes, you change an existing prompt or message for digital assistant users. Digital assistants are virtual devices that help users accomplish tasks through natural language conversations. The digital assistant has a set of standard messages and prompts to handle situations such as:

- Welcoming the user.
- Offering help.
- Providing a choice between multiple intents when it's uncertain what intent the user is seeking.
- Managing the transition when the user breaks the expected flow in a conversation.

When this happens, the digital assistant helps to manage the transition to and from the original flow.

In addition, there are settings for things like the maximum number of options to display in the help and welcome screens.

To access these settings:

1. From your Infrastructure Console, click the hamburger icon to open the side menu and select **Development** > **Digital Assistants** and open your digital assistant.
2. Click the settings icon and select the **Configurations** tab.
3. Scroll down to the **Conversation Parameters** section of the page.

Note: For digital assistants based on platform version 21.04 and higher, resource bundle entries are created for textual properties by default.

You can access and edit the resource bundle entries for these properties by clicking the Resource Bundles icon to open the Resource Bundles page and selecting the **Configuration** tab. For more information about personalizing your digital assistant, see [Personalize Your Digital Assistant](#) on the [Oracle Help Center Sales](#).

What are the best practices when an employee leaves the company?

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

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

In addition, user accounts are suspended automatically when a user has no roles. Security specialists can inactivate a user account manually, if necessary. After a user account is suspended, the user no longer has access to Sales objects like leads and opportunities.

See the related topics for more information.

Related Topics

- [How User Accounts Are Suspended](#)
- [User Account Maintenance Option](#)

Can I set custom object data visibility based on security roles?

You can use access groups to allow or restrict access to data based on user roles.

Access groups use the access control list model. You create an access group, assign users to the access group, and all group members are given access to standard or custom object data. You define object sharing rules which provide users with access to the specific records of an object. These rules specify the type of access to an object to be provided and the conditions under which the access is provided.

See the related topics for more information.

Related Topics

- [How do I create and manage access groups?](#)
- [How do I create membership rules for custom access groups?](#)
- [Can I rename a custom role in an access group?](#)
- [How do I enable team-based access to custom objects when using access groups?](#)
- [How do I configure real-time and near real-time access for access group object records?](#)

How to I provide read-only access for users?

You might want to give some users read-only access to Sales and Fusion Service applications.

For example:

- A service representative must replicate a user's transaction without saving any changes.
- An auditor reviews application data for regulatory reasons but isn't authorized to change anything.

Read-only access is controlled by the Read Only Mode (FND_READ_ONLY_MODE) profile option.

Set the Read Only Mode Profile Option

To enable read-only mode for a user:

1. In the Setup and Maintenance work area, use the **Manage Administrator Profile Values** task.

2. In the Search section of the Manage Administrator Profile Values page, enter **FND_READ_ONLY_MODE** in the **Profile Option Code** field and click **Search**.
3. In the FND_READ_ONLY_MODE: Profile Values section of the page, click the **New** icon.
4. In the new row of the profile values table:
 - a. Set **Profile Level** to **User**.
 - b. In the **User Name** field, search for and select the user.
 - c. Set **Profile Value** to **Enabled** to activate read-only access for the selected user.
5. Click **Save and Close**.

When the user next signs in, a page banner reminds the user that read-only mode is in effect. The user can edit values in the application but can't update or save any changes they make.

How do I configure what information displays in the product catalog using Visual Builder Studio?

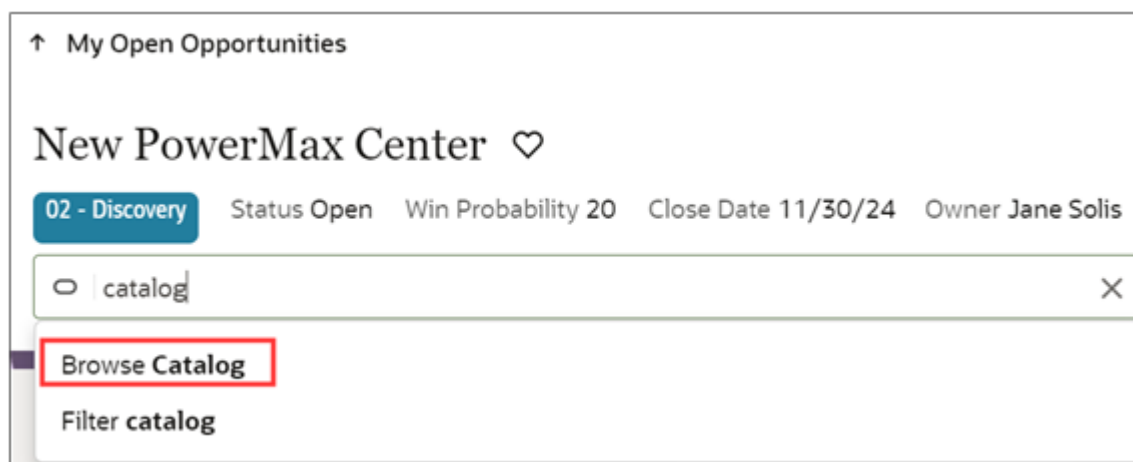
Here's how to configure what information displays in the product catalog in your Sales in the Redwood User Experience application. You can configure both product groups and products and you can configure different layouts for different roles in your organization.

Before you start, make sure that the product catalog includes products, product groups, and the attributes that you want to expose. Attributes that are blank don't show up in the UI.

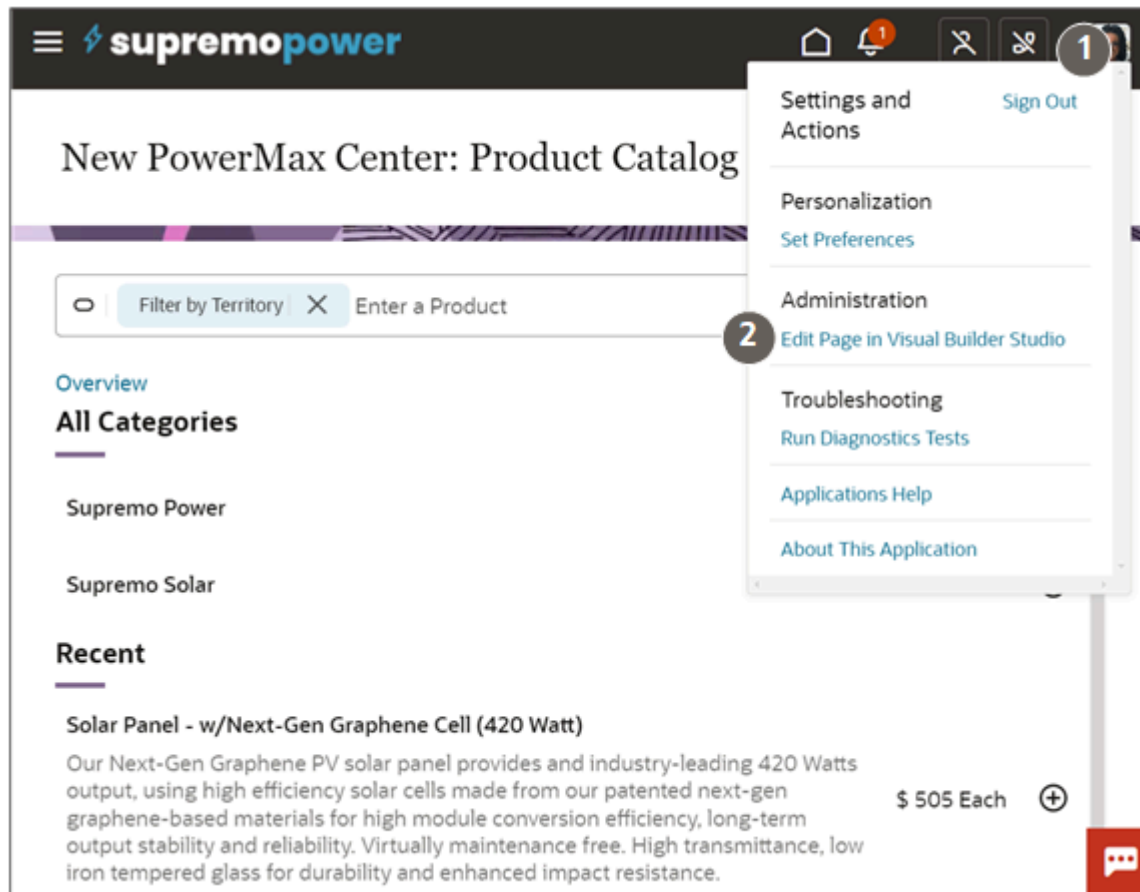
You open Visual Builder Studio from the Product Catalog page and the page must show what you're configuring: product groups and a product under the Recent heading.

Configure Product Groups

1. Open an opportunity.
2. Enter **Catalog** in the **Action Bar** and select **Browse Catalog**.

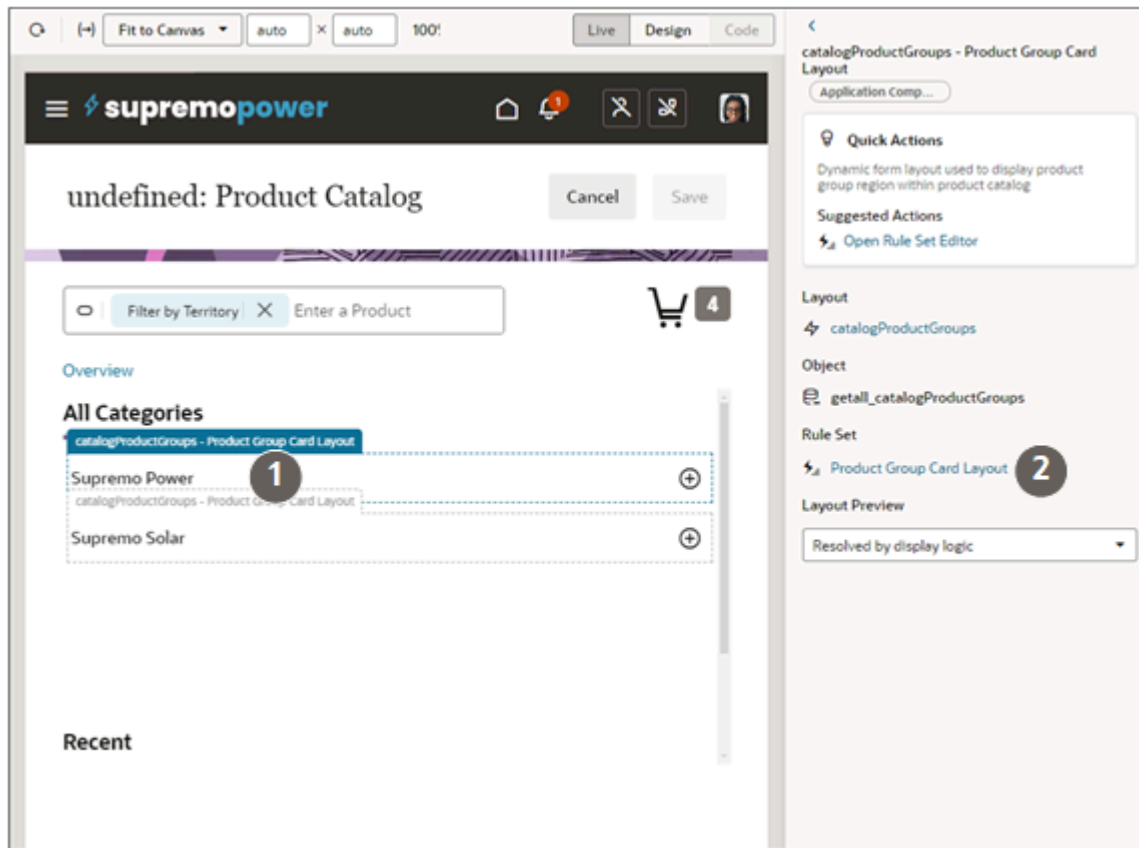


3. In the Product Catalog page, click your profile and select **Settings and Actions** > **Edit Page in Visual Builder Studio** to open Visual Builder Studio (VBS).

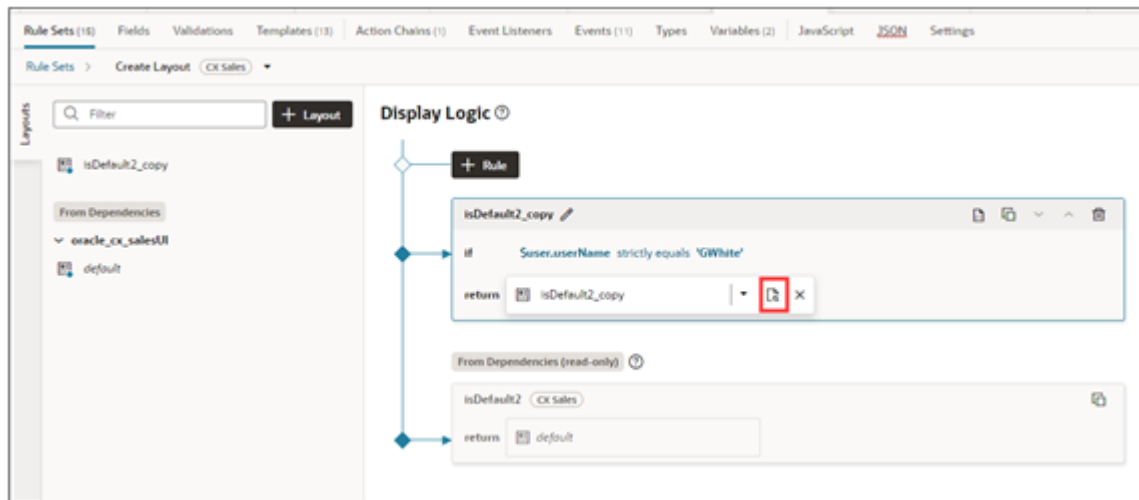


4. In the central VBS panel, click one of the product groups in the page under the **All Categories** heading to display a border for the **Product Group Card Layout** (callout 1 in the following screenshot).

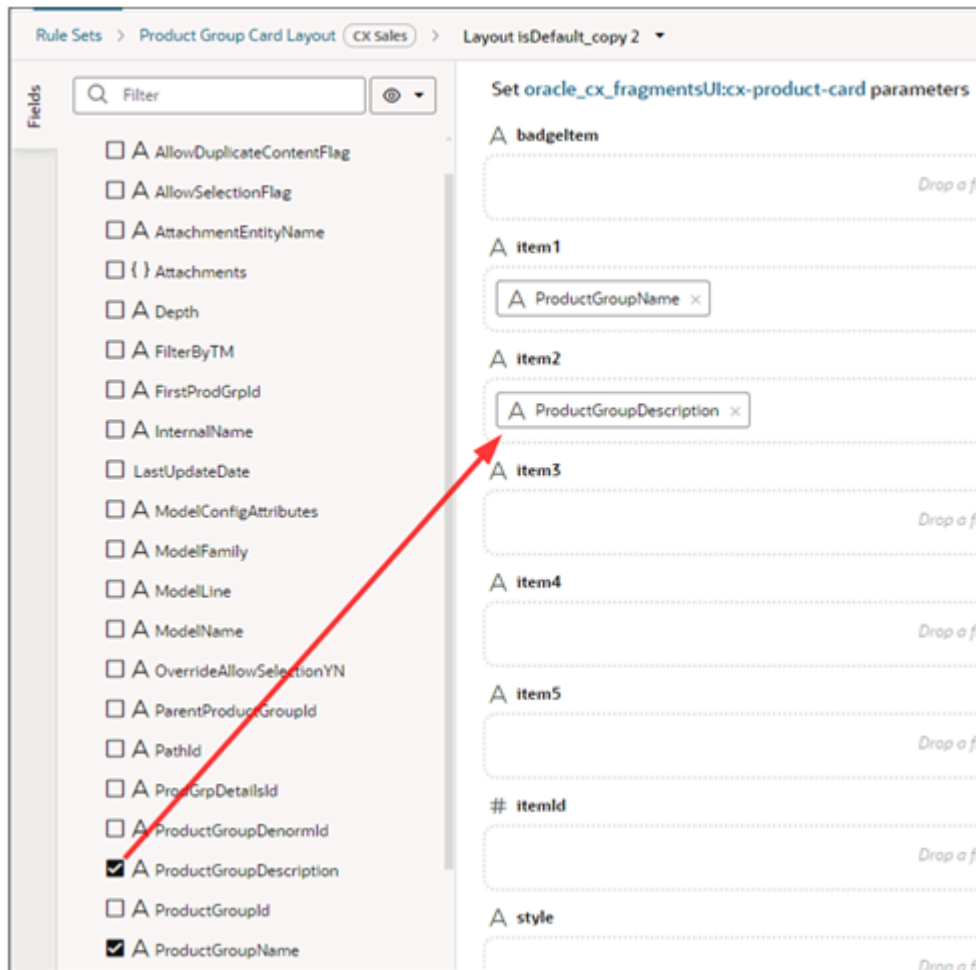
- Under the **Rule Set** heading in the right pane, click the **Product Group Card Layout** link (callout 2).



- Duplicate the default layout and open it by clicking the **Open** button highlighted in the following screenshot.



7. You can drag additional fields from the Fields tab. Or you can remove and reorder them.



8. Preview your configuration by clicking the **Preview** button.

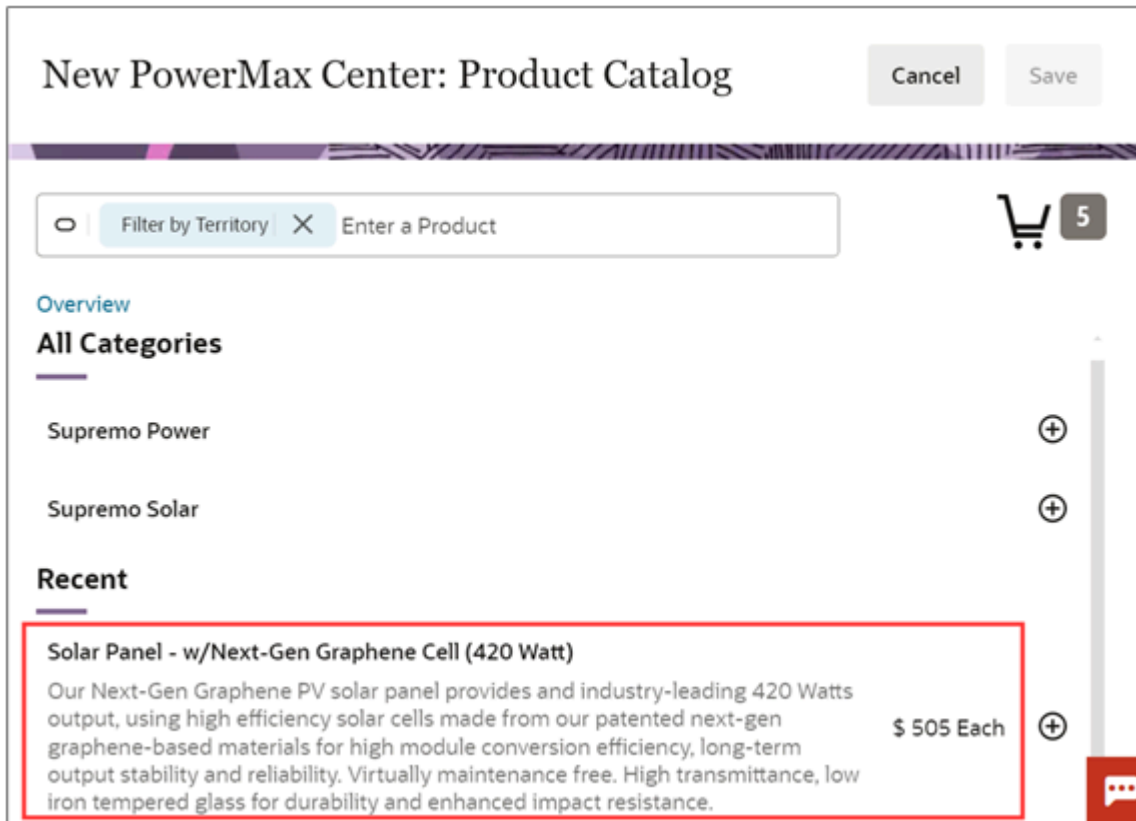


9. Click **Publish** to make your configuration permanent.

Configure Products

The steps to configure products is very similar to configuring product groups. The main difference: To easily identify the layout, you must display a product under the **Recent** heading of the product catalog. You can do this by adding a product to the opportunity from the catalog and then adding another.

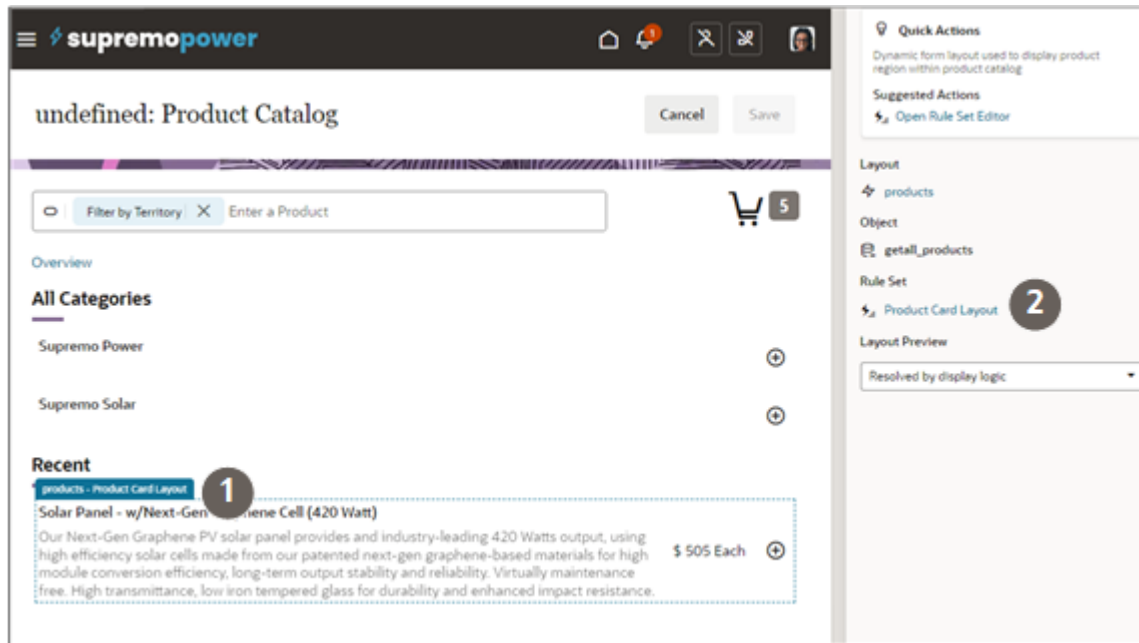
Here's a screenshot of the product catalog showing a product under the **Recent** heading.



Here's a recap of the detailed steps:

1. Open an opportunity.
2. Enter **Catalog** in the Action Bar and select **Browse Catalog**.
3. Add a product to the opportunity from the catalog and save.
4. Add a second product. The first product should appear under the Recent heading.
5. From the Product Catalog page, click **Settings and Actions** > **Edit Page in Visual Builder Studio** to open Visual Builder Studio.
6. Click the product in the page under the **Recent** heading to display a border for the **Product Card Layout** (callout 1 in the following screenshot).

7. Under the **Rule Set** heading in the right pane, click the **Product Card Layout** link (callout 2).



8. In the Display Logic pane, duplicate the default layout and open it.
9. Drag additional fields from the Fields tab. You can also remove and reorder fields.
10. Preview your configuration by clicking the **Preview** button.
11. Click **Publish** to make your configuration permanent.

How can I find out the number of active users and their roles?

The User System Usage subject area in Oracle Transactional Business Intelligence (OTBI) gives you information on user activities, and the User Role Membership Report uses a scheduled process to give you role memberships for specified users.

See the related topics for more information.

Related Topics

- [User Role Membership Report](#)
- [User System Usage subject area](#)

How can I find the inventory ID of a duplicate product?

To find the inventory ID of a duplicate product, you can make an SQL query to the QSC_PRODUCTS_B table.

See the [Tables and Views for Sales and Fusion Service](#) guide for more information on the table.

You might also want to get a list of all products and product groups in your sales catalog. See [How can I get a list of all products and product groups?](#) for more information.

How do I get activities to show up in the records I imported into Oracle Sales in the Redwood User Experience?

For activities to show up in the records you imported into Oracle Sales in the Redwood User Experience, you must run the Publish Feed Elements scheduled process to enable the Activities panel and subview for the records you import. The process publishes the indexes required for Oracle Adaptive Search to track activities for all objects that have activities enabled, including leads and opportunities. You can't run the process separately for individual objects.

To learn which records the process updates and how to run it, see the topic: [How do I enable the list of activities in each record in Oracle Sales in the Redwood User Experience?](#).

Why can't I find Batch Address Cleansing options?

To use the address cleansing functionality, you need to have the license for the customer data quality application.

Why aren't Microsoft Outlook appointments syncing to CX?

If your users' appointments aren't syncing correctly with CX in the Microsoft Outlook add-in, check the appointment sync settings for the app.

Note that sync settings are different depending on whether you're using the latest version of the add-in, the Microsoft 365 Integration for Oracle Sales Redwood User Experience, or the previous version, Microsoft 365 Sales for Outlook.

Note: Oracle recommends that you use the Redwood User Experience (UX) version of the Microsoft Outlook add in, not the previous version. See [Overview of Microsoft 365 for Redwood UX](#) for more information.

For sync settings in the latest version, see [Review and Modify Data Synchronization Settings](#).

For sync settings in the previous version, see [How do I set sync options in the previous version of the Microsoft Outlook add-in?](#).

How do I display the Eloqua digital profile in Oracle Sales in the Redwood User Experience?

To display the Eloqua Digital Profile in leads and contacts in Oracle Sales in the Redwood User Experience, you must enable the Show Digital Profile smart action in Application Composer. Salespeople view the digital profile by entering **Show Digital Profile** in the Action Bar.

Here's how to enable the Show Digital Profile smart actions for leads and contacts. There's a separate smart action for each.

1. Navigate to **Configuration > Sandboxes** and create and enter a sandbox with Application Composer.
2. Open Application Composer from the sandbox **Tools** menu.
3. In Application Composer, click **Smart Actions**, available under Common Setup.
4. Search for **Digital Profile** using the search box.
5. Enable one or both of the smart actions, by setting the **Enabled** attribute to **Yes**.
6. Publish the sandbox by selecting **Publish** from the menu which appears on the sandbox name.

Why is my contract active even though I set an end date?

You might need to close the contract and ensure that the Update Contract Status scheduled process has run.

Here's how you close a contract:

1. While in an active contract, from the Actions menu, select **Close**.
2. Enter a close reason in the dialog box and save.
3. Ensure that the Update Contract Status scheduled process has run.

How do I close a contract?

You close a contract by setting some values and ensuring that the Update Contract Status scheduled process has run.

Here's how you close a contract:

1. While in an active contract, from the Actions menu, select **Close**.
2. Enter a close reason in the dialog box and save.
3. Ensure that the Update Contract Status scheduled process has run.

What privilege do I need to create sales contacts?

You need the Create Sales Party Contact privilege to create sales contacts. The predefined Sales Representative role includes this privilege.

Related Topics

- [What are the privileges required to delete sales accounts and contacts?](#)

Why do I see references of deleted accounts?

Deleting an account doesn't delete account-related objects.

When you delete an account, the entire record is removed from the sales application and can't be restored. In general, when you delete an account:

- The account party status becomes inactive in the database.
- The deleted account doesn't appear in the accounts list, account search, account list of values, account data quality match, segmentation, and recent items.
- The deleted account's profile and children, such as attachments and notes, can no longer be viewed.
- The account's contact relationships, if any, are deleted. The contact can still be viewed, but deleted contact relationships aren't shown in the contact.
- Deleting an account doesn't delete account-related objects, such as opportunities, leads and tasks. You can still view related objects and the account name on these objects, but you can no longer access the deleted account's details.
- To remove inactive accounts, you can manually remove them or run the Purge Inactive Data process. When you run the process all the references to the purged data are also deleted. Purged accounts, contacts, or households won't appear on application pages, web service response, and BI reports. For more information on purging data, refer to the Purge Inactive Data scheduled process documentation.

Why isn't the Create Autofulfillment Lines action available for my contract?

If the Create Autofulfillment Lines action isn't available when working in a contract, ensure the user you're signed in with has the Supplier Contract Administrator job role.

Can the Contract Administrator be a part of multiple contract organizations?

No, you can only assign a resource the Contract Administrator role for one contract organization. A resource can have only one organization membership and only one role only in that organization.

Why doesn't the Business Unit list of values show any BUs?

You might not have set up multiple business units. Ensure that you've followed the implementation steps to set up multiple BUs.

See [How do I enable multiple business units \(BUs\) for sales?](#) for more information.

Why am I getting an error when trying to remove an inherited role?

Roles are hierarchical. For example, Role A inherits Role B, which in turn inherits Role C. When editing role A you can't remove Role C. However, you can remove Role B. To remove Role C from Role B, you must edit Role B.

In the UI, you see roles and the inherited-by roles. To see which roles are directly inherited by the role being edited, use the Inherited By filter.

Related Topics

- [What should I know about copying and editing predefined roles?](#)
- [How do I enable desktop pages for Resource Directory?](#)

How can I get a list of Fusion messages?

To get a list of Oracle Fusion messages, query the FND_MESSAGES_B table. See the FND_MESSAGES_B section of the [Tables and Views for Common Features](#) guide for more information.

Will assigning predefined roles and privileges impact my Oracle Cloud subscription?

Before you use predefined roles and privileges as is, consider that it might impact subscription usage, even if you haven't bought that subscription. See [Advisory Note on Subscription Impact](#) for more information.

Can I change the "from" address in a workflow email address?

To edit the "from" email address in a workflow email, follow the steps in [Set Up the From Field in Workflow Email Notifications](#).

To edit the display name in the "from" email address, follow the steps in [Set Up the From Field in Workflow Email Notifications](#).

Related Topics

- [About Email Notifications](#)

How can I recover lost data?

Oracle Cloud Operations makes daily backups of your production and test environments. Oracle Cloud Operations doesn't back up or restore operations on demand, however. Once provisioned, you're the sole owner of the data and metadata configuration.

You can make backups of your own by exporting sales data using Export Management. You can export metadata using Customization Set Migration (CSM) and Functional Setup Manager (FSM) Migration. You can migrate BI Publisher reports and data models from one environment to another.

For more details, review these documents on My Oracle Support:

- [Frequently Asked Questions on Hosting Scenarios for Oracle Cloud Fusion Applications Services \(Doc ID 1537549.1\)](#)
- [Best Practices and Recommendations for Using Customization Set Migration \(CSM\) Feature \(Doc ID 2116725.1\)](#)
- [Best Practices for Functional Setup Manager Migration - Export and Import \(Doc ID 2632594.1\)](#)
- [Business Intelligence Publisher Enterprise User Interface Steps To Migrate The BI Publisher Reports Folder And Data Models From One Environment To Another \(Doc ID 2494901.1\)](#)

Related Topics

- [How does Oracle back up my Sales data?](#)

What kinds of visualizations are available in OTBI?

For a list of visualizations available in Oracle Transactional Business Intelligence (OTBI), see the topic [Edit Various Types of Views](#) in the Creating Analyses and Dashboards in Oracle Transactional Business Intelligence guide.

How can I change the currency precision for Amount fields in Sales?

Precision is the number of digits placed after the decimal point. For example, to display one dollar as \$1.00 in the UI, you set the USD currency to precision 2. By default, all currencies are enabled. But it's a good idea to double-check that all of the currencies you plan to use are enabled and that their precision levels are set correctly.

Let's say you want to display currency amounts without any decimal place digits, then you can leave the precision field blank for the currency you want displayed with no decimal places. Here's how.

1. In the Setup and Maintenance work area, go to:
 - o Offering: Sales
 - o Functional Area: Company Profile
 - o Task: Manage Currencies
2. On the Manage Currencies page, click **Search** to search for all currencies, without entering any search criteria.
3. Check that the **Enabled** option is set for each currency you plan to use.
4. For each currency you plan to use, expand the selected currency and from the **Precision** field, remove the value and leave blank.

Note: The level of decimal precision that you specify must match the precision value set on the Manage Currencies page for the country. When setting currency precision, be sure to set it correctly for all currencies you plan to use. This best practice ensures that decimal places are shown consistently in the UI for all the currencies you're using.

5. If you made any changes, save your work.

How do I generate artifacts manually?

Artifact generation is triggered automatically when you publish a sandbox.

If the artifacts aren't generated automatically, you can regenerate the artifacts manually.

1. From the **Navigator** select **Import Management**.
2. In the landing page select **Import Configuration Tab**.
3. Click **Generate Import and Export Artifacts**.
4. Click **Generate**.

Related Topics

- [Publish Sandboxes](#)

What generative artificial intelligence features are integrated with Sales?

Generative Artificial Intelligence (Generative AI) is the name given to a subset of artificial intelligence tools from Oracle that quickly creates content in response to text prompts. Generative AI is a fully managed Oracle Cloud Infrastructure (OCI) service that provides a set of the latest Large Language Models (LLMs) that cover a wide range of use cases for text generation and summarization.

Note: Generative AI for Sales features are currently controlled by promotion codes. To get a promotion code, go to the Sales forum on Oracle Customer Connect or raise a service request on My Oracle Support. Use the Opt In UI to enable these Generative AI for Sales features.

Large language models are machine learning models that comprehends and generates human language text by analyzing massive data sets of language. Generative AI content ranges from short and simple to very long and complex data that helps salespeople boost their productivity when collaborating with their customers and knowledge partners. However, LLMs can sometimes render text that isn't realistic and might provide misinformation in some instances. Mistakes happen when language models interpret inaccurate information so it's important that content generated by LLMs is thoroughly reviewed before using its content when communicating with your customers or for other activities.

Once your organization identifies the information to extract from documents, sales administrators can specify the prompt and format to automate the generation of content to suit your own unique requirements. The key to extracting content is in the prompt used so that the best responses are generated using Generative AI that works best for your users.

Generative AI features Available for Oracle Sales

Here's a list of the different Generative AI features available to configure using the administration UIs for Generative AI for Oracle Sales in the Redwood User Experience.

Automate Key Account Descriptions

Feature	Description
Generate Account Description using LLMs Public Knowledge of Account	You can use Generative AI to generate account descriptions based on large language models public knowledge about an account. Generative AI helps automate the process of gathering, analyzing, and synthesizing key account information, resulting in correct and up-to-date information about your key accounts. You can change the prompt template to generate an account description that meets the requirements of your organization. Using valuable insights about your accounts, you can proactively adapt your account plans to stay ahead of the competition. This Generative AI feature helps improve efficiency and enhance your overall account management capabilities.
Generate Account Descriptions from .PDF Documents	Use Generative AI to generate account descriptions from .PDF documents, such as a 10k financial disclosure document, to help with account planning activities. For example, select and upload a 10k document and once processing is completed, click Generate to generate a description based on the 10k document. The generated description is displayed in the text area where you can review and change the description. You can use the Writing Assistant feature to either proofread or change formatting before saving the description.

Feature	Description
	This feature saves you a lot of time as you can easily research the account rather than spending hours going through long documents or searching on the internet for information about the account. You can enable a smart action to enable this feature from the Action Bar. See How do I enable the Generate Account Description smart action? for more information.
Use Action Bar to Request Summaries	You can use the Action Bar to request summaries that are generated in real-time from Oracle's Generative AI service. For example, enter the following commands from the Action Bar in the respective object pages: • Show Activity Summary - This command provides a concise summary of recent activities along with action items for Oracle Sales records. This lets you get quickly oriented without navigating to or reviewing individual activity or communication details for the account, opportunity, or lead records. • Show Opportunity Summary or Show Lead Summary or Show Account Summary This command provides a clear summary of the key information for the record transaction of the object. It opens a drawer over the object page and generates, in real-time, a summary of all record transactions and activities. • Generate Account Description This command enters a new drawer where you can upload a file (such as a 10K) or type a description for the account organization. Use Generative AI to execute a summary on the information entered. This feature isn't generated in real-time.

Generate Scripts for Won and Closed Opportunities

Feature	Description
Generate Customer Win Story when Opportunity is Won and Closed	Generative AI can help create win stories from existing data about won and closed opportunities. You can easily share the AI generated win stories with your sales organization to help other sales team members learn from existing won opportunities. Win stories provide valuable insights into what works well in the process of wining and closing sales opportunities. These stories can be used to improve future sales and marketing strategies.

Promote Sales Collaboration Process

Feature	Description
Generate Initial Outreach Email	Use Generative AI to generate an initial outreach email, which is a tailored introduction to your services, and used to discuss the potential of a partnership. The feature uses a prompt template that specifies the input parameters to include in your outreach message and the tone of how you want to deliver the message in the email. For example, if a customer is available for a discovery call, the Generative AI process can automatically generate email content using the context of the sales process step to send an email reply on your behalf. This feature saves time by helping you with the follow-up process for collaborating with your prospects and customers based on a suitable email reply template.

Enhance Productivity of Salespeople

Feature	Description
Compose Emails	With Generative AI, you can easily and efficiently draft an effective yet personalized outreach email to send to your customers. This feature uses the following context, if available, to automate the generation of email content to send to recipients. • Account name • Product details • Your company name • Title of the person sending the email The feature uses separate prompt templates for the different business objects such as leads, opportunities, contacts or accounts. This enables the Generative AI process to consume context from the specific object into the prompt used to generate the email. The person composing the email should clearly check and verify the content generated for correctness and accuracy and ensure it's appropriate for the recipients. You can also use the prompt bar to personalize the email, proofread and edit the email, and change the tone of the email and so on.
Reply To Emails	Use Generative AI to generate a reply to an email received from your contacts. You can now simply click the Generate button from your email application to generate an email response to those contacts on the email you received. This action uses the original email message to generate a reply that displays in the email body. Note: Sometimes the content generated by AI powered tools might contain inaccurate information so before you reply to the email, you must review the content to ensure that its correct and appropriate to the recipients. You can then further edit the content of your reply and use the prompt bar to do simple things such as proofread your reply, change the tone and so on to personalize your response.
Generate Appointment Agenda from Email	Using Generative AI, you now have the option to generate an agenda for your appointment from within an email for Oracle Sales. Click the Generate Appointment Agenda email option to open the Generate Appointment Agenda panel and the Description field is automatically populated with agenda items to include for your upcoming appointment. This feature saves you time when formulating an agenda and lets you easily generate well written appointment agenda items from an email. As with all generative AI features, its best practice to review the content of your agenda to ensure that its correct and appropriate to your audience.
Manage Notes	Use Generative AI to manage notes content for Oracle Sales. For example, after you've entered text for your note, you can use the prompt bar to add instructions for Generative AI to manage the content of the note. You can request Generative AI to proofread the content by simply typing proofread in the prompt bar and then click Generate. You can also summarize the note by typing summarize in the prompt bar or change the layout of the notes format to bullet format and so.
Maintain Version History with Writing Assistant	Writing Assistant uses Generative AI to maintain a version of drafts as you compose email or notes. Each time you use Generative AI to further improve the text of an email or notes, the Writing Assistant feature remembers the previous version. For example, you can easily revert to a previous version of the note or email so any previous updates you might have done are available if the current response isn't appropriate. This saves a lot of time and effort and helps generate useful content when using the Writing Assistant feature. Note: Version are maintained only in the current editing session when updating current notes or email. A new version is created each time you click Generate.

Manage Prompts Used for Generative AI Features

Feature	Description
Use Administration UI to Manage Prompts Used for Generative AI Features	You can use the administration UI to manage the prompts used for Generative AI features. This feature lets you adjust the Generative AI prompts to your own unique business requirements so that the best responses are generated that works best for your users. From the UI, you can define the format of the Generative AI output by selecting fields from objects into the prompts. You can preview the response result within the UI by replacing field values with sample test data and once you're satisfied, save the prompt to make it available within the application.

When does auto accept occur on a lead?

A lead will be auto accepted for users with sales channel as ZPM_DIRECT_CHANNEL_TYPES.

What effect does the predefined Opportunity Owner Mapping Set have for territory assignment?

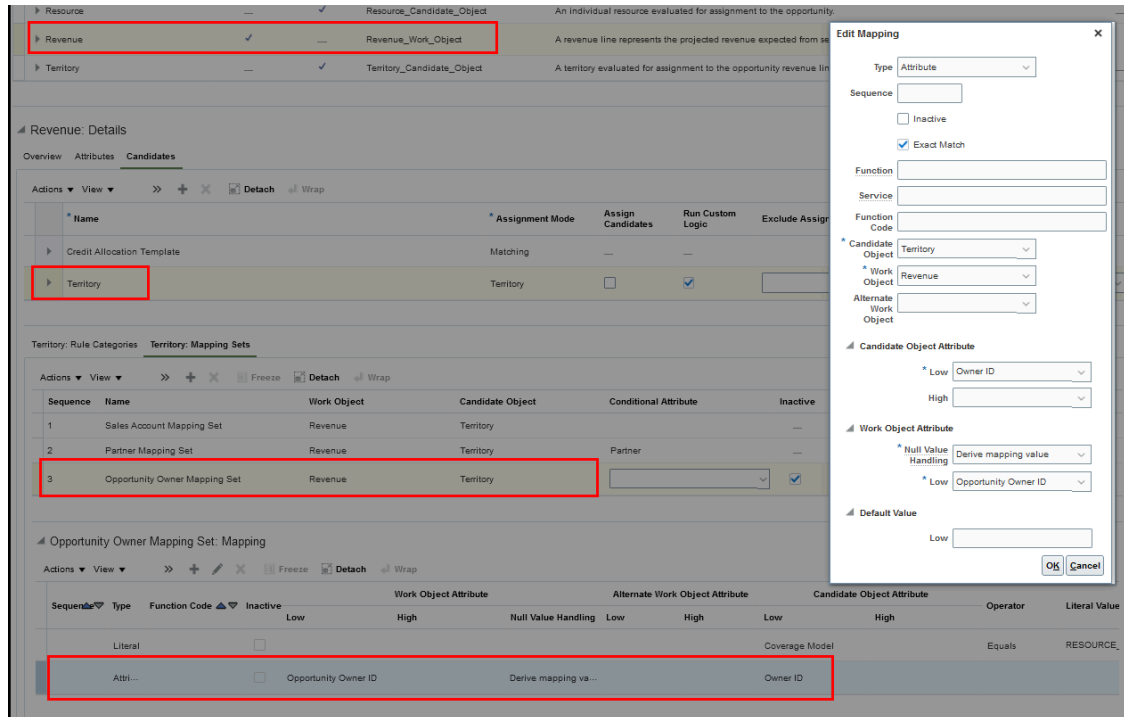
The **Opportunity Owner Mapping Set** assigns territories to opportunities where the opportunity owner is also the owner of the territory. Assignment mapping sets and their underlying mappings drive territory-based assignment. This mapping enables you to compare and match attribute values between a work object attribute such as Revenue and a candidate object attribute, such as Territory. When the value of the candidate object attribute matches the work object attribute, the candidate is selected.

The mapping set concept is used only with territory-based assignment. Attribute mappings are typically used when the work object and candidate object attributes in the comparison are non-dimensional attributes. Candidate objects are related to work objects, and, for each relationship, the appropriate assignment mode (such as matching and scoring) and processing options are predefined. Literal mappings are a way of filtering the matched territories based on specific values of a territory attribute.

Here how to access the predefined **Opportunity Owner Mapping Set** mapping set for the Revenue work object and Territory candidate object.

1. Select **Navigator > My Enterprise > Setup and Maintenance**.
2. Search for the **Manage Sales Assignment Manager Objects** task.
3. Select the **Revenue** work object. A revenue line represents the projected revenue expected from selling a product.
4. In the **Revenue: Details** area, click the **Candidates** tab.
5. Highlight the **Territory** row and then click the **Territory: Mapping Sets** tab.

- Highlight the **Opportunity Owner Mapping Set** mapping and from the Actions menu, select Edit to display the following screenshot.



Related Topics

- [Assignment Mapping Set Components](#)

How can I create an approval process for opportunities?

You can create approvals for opportunities and other objects using object workflows to trigger business process workflows. For example, you might want to create an object workflow that triggers a notification when there's a change in the sales stage of an opportunity or if you require to trigger an email approval for a change to an assessment template.

Using Oracle Business Process Manager (BPM) you can create different types of approval workflows, including group approvals, parallel approvals, and multiple approvals on a single record.

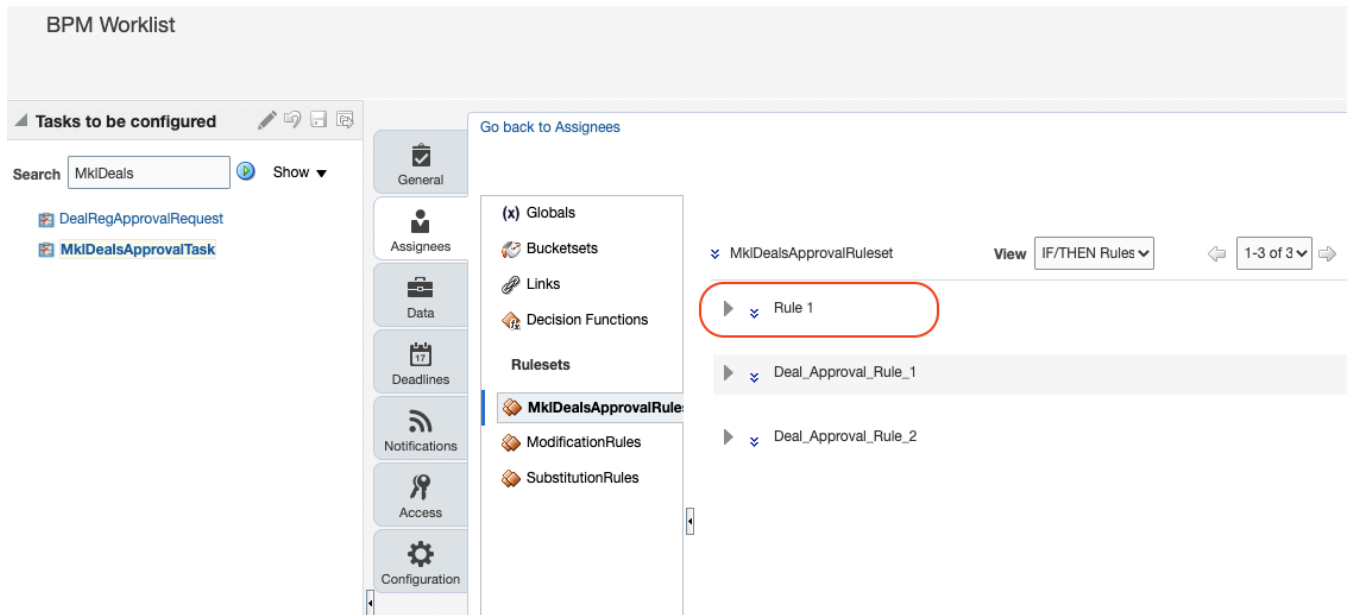
For more details, see the topics [Object Workflows and Business Processes](#) and [Configure an Approval Process for Opportunities](#).

How can I make the deal approver the deal owner?

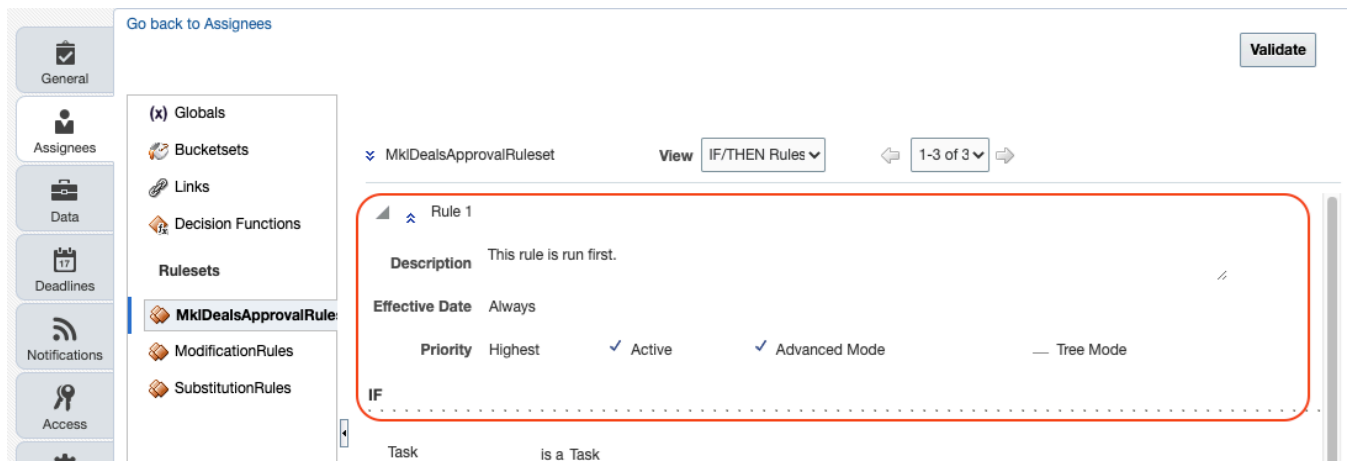
You can follow these steps to make the deal approver the deal owner:

1. Navigate to Worklist as admin, **Task Configuration** > **MkIdealsApprovalTask**, and then edit the task.

2. Create a new rule, Rule 1, as shown below:



3. Select **Advanced Mode** check box.



4. Create the rule definition as shown in the image, a FOR loop to iterate the team members. Identify the owner and assign the resourceUsername to ApproverBuffer.

Note: ApproverBuffer variable is used in Deal_Approval_Rule_2 out of the box.

The screenshot shows the Oracle Fusion Cloud Sales Automation interface. On the left is a navigation menu with icons for Assignees, Data, Deadlines, Notifications, Access, and Configuration. The main area displays the 'MkiDealsApprovalRuleset' configuration. The 'View' dropdown is set to 'IF/THEN Rules'. The rule 'Rule 1' is selected and highlighted with a red box. The rule definition is as follows:

```

IF
  Task is a Task
  and
  Lists is a Lists
THEN
  for ( DealResource teamMember : Task.payload.getDealResponse.result.dealResources )
    if
      teamMember.ownerFlag is true
    then
      assign ApproverBuffer = teamMember.resourceUsername
  
```

5. Inactivate the Deal_Approval_Rule_1 by deselecting the **Active** check box.

The screenshot shows the Oracle Fusion Cloud Sales Automation interface. On the left is a navigation menu with icons for Assignees, Data, Deadlines, Notifications, Access, and Configuration. The main area displays the 'MkiDealsApprovalRuleset' configuration. The 'View' dropdown is set to 'IF/THEN Rules'. The rule 'Deal_Approval_Rule_1' is selected and highlighted with a red box. The rule definition is as follows:

```

Description: Enable this along with Rule1. This must be lower priority than Rule1.
Effective Date: Always
Priority: Lower
Active: [x]
Advanced Mode: [ ]
Tree Mode: [ ]
  
```

Now, you can login and create a deal. Mark the appropriate user as owner and submit the deal for approval. When you navigate to the Approvals tab, you will see that the respective user is also the deal approver.

Which roles do users need to manage notes?

Several of the supplied job roles include the privileges to manage notes.

The Sales Administrator job role is one of the roles that provides access to manage notes. Other roles are also predefined with notes privileges.

To find which other roles allow users to manage notes, search for "notes" in the *Security Reference for Sales and Fusion Service* guide.

How can I calculate the number of days based on start date and end date using Groovy?

You can use this Groovy sample script to calculate the number of days for your sales object:

```
def Number of days = day(EndDate) - day(StartDate)
```

The script uses the `EndDate` and `StartDate` attributes to calculate the difference.

How do I add custom Channel Type LOVs for Interactions?

In Oracle Sales in the Redwood User Experience, you can add more channel types to the lists-of-values (LOVs) for Interactions.

To add other Interactions channel types:

1. Navigate to the **Manage Communication Channels Task** in Setup and Maintenance: Go to the Sales offering and search for the task.
2. Click **Create Channel**.
3. In the Create Channel window, select:
 - **Stripe Code:** CRM
 - **Purpose:** SALES
 - **Channel Type:** Select the channel type that meets your business needs.
 - **Account Name:** Enter the name of the channel type.
 - **Business Unit:** Select the business unit you want to associate the channel type to.
4. Save your work.

How do I set the duration for user session timeouts?

User timeout session durations are set in the Oracle Identity Cloud Service console.

Here's how to change the duration:

1. In the Identity Cloud Service console, expand the navigation drawer and click **Settings > Session Settings**.
2. Update the session timeout value (Session Expiry) according to your preference.

3. Enter the Logout URL that users will be redirected to after signing out of the Oracle Identity Cloud Service UI.
4. To allow client applications that run on one domain to obtain data from another domain, enable the CORS slide button. Enter the domain names URLs.

See the Oracle Identity Cloud Service [documentation on managing security settings](#) for more information.

Why isn't the Lock button visible in a product group?

If you can't select the Lock button when managing product groups in the Oracle Sales Catalog, make sure the product group isn't already locked for editing by another user.

Why can't users see their alerts in the bell notifications?

If users' email alerts aren't appearing in the Notifications (bell notifications) list:

1. Sign in using a user role that has access to one of the workflow administrator roles. See [Roles That Give Workflow Administrators Access](#) for more information.
2. Click the **Notifications** icon in the global header.
3. Click **Show All**.
4. On the Notifications page, click the **Worklist** button.
5. In BPM Worklist, click your **user name** and select **Administration**.
6. On the Application Preferences page that's on the Administration tab, open the **Test Notification Email Address** field and set its value to a blank value (remove all the text inside it).

Related Topics

- [Roles That Give Workflow Administrators Access](#)

Can I disable the delete action from the calendar?

The easiest way to disable users' ability to delete calendar appointments is to create an object trigger on the Activity object.

Your object trigger needs to be on the Before Remove action. It will display an error when a user tries to delete an appointment.

Here's a sample script that will restrict the ability to delete calendar items based on a user role:

```
// Get the security context def secCtx = adf.context.getSecurityContext()

// Check if user has a given role if (secCtx.isUserInRole('MyAppRole')) {

// get the current user's name def user = secCtx.getUserName()

// Do something if user belongs to MyAppRole
```

}

See the *Configuring Applications Using Application Composer* guide for more information.

How do I disable activity notifications?

To prevent the application from sending email notifications about activities like calendar appointments, set the Disable Appointment E-Mail Notification profile option (ZMM_ACTIVITY_DISABLE_EMAIL_APPT_NOTIF) to No.

You can access the profile option using the Manage Administrator Profile Values task in the Sales offering's Sales Foundation functional area in Setup and Maintenance.

Related Topics

- [How do I set up activity notifications?](#)
- [What determines which task and appointment notifications salespeople receive?](#)

How do I run the Request Dispatch Job?

The Request Dispatch job is used to process duplicate resolution requests that are in Pending or Submitted status.

You can use the Run Request Dispatch Job setup task to run request dispatch jobs in the following modes:

- Basic: To submit the request dispatch job for immediate processing.
- Advanced: To schedule the process to run either immediately or on a recurring periodic schedule, such as every hour or every day.

You can also submit request dispatch jobs directly from the Duplicate Resolution work area by clicking the Dispatch button, which will submit the job for immediate processing.

You can use the Scheduled Processes page to monitor the status of Request Dispatch jobs by querying for "Schedule Duplicate Resolution Requests" processes or by querying the specific process ID that was provided when you submitted the job.

How do I delete child entities of inactive party records?

Use the Delete Child Entities of Inactive Party Records scheduled process to delete all associated child entities of inactive party records. Delete child objects and related entities when the parent record is in an inactive or merged status.

When you delete parent record like account, contact, household, hub person or hub organization from the UI pages, web services, or file import, all child entities like contact points, relationships, address, source system references and so on aren't deleted automatically. So, you can delete these records by running this scheduled process on a regular basis.

You can inactivate all related child entities for the already inactivated parent party record. This resolves data integrity concerns and prevent export of child records of inactive parent records using Export Management.

The source system references of the following child entities of the inactivated Sales Account or Sales Contact are also inactivated:

- Additional Names
- Additional Identifiers
- Contact Points
- Contact Preferences
- AddressPurposes
- Address
- SourceSystemReference
- Classification
- Relationship

When to Use

This scheduled process is used to inactivate the child entities of a deleted Sales Party. Once the Sales Account or Contact is inactivated or merged, all the child entities of that party can be inactivated.

Privileges Required

Verify that you have the following role:

- Master Data Management Application Administrator

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
 - You can run this scheduled process based upon your need. This is to inactivate the child entities of the deleted party. So it can be scheduled to run incrementally to inactivate the child entities of inactivated parties.
 - It can also be run ad-hoc based on the need basis.
- Execution Time:
 - This scheduled process takes few minutes for completion for smaller set of data.
 - This scheduled process may take 15 to 30 minutes to process a batch of 100K inactivated parties.
- Compatibility:
 - This scheduled process is self-incompatible. If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.

Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
From Date	Optional	Specify the starting date in the date range for searching inactive records.	Date	No	None
To Date	Optional	Specify the ending date in the date range for searching inactive records.	Date	No	To Date should be greater than From Date
Party ID	Optional	Specify the party identifier	Party identifier	No	None
Party Number	Optional	Specify the party number	Party number	No	None

Troubleshooting Information

- Check the log or output file.
- If the scheduled process didn't run successfully, you can re-submit the process after rectifying the error.
- This scheduled process is idempotent, which means, this scheduled process can be restarted if it failed in the initial run. No cleanup is required.

Related Topics

- [Import Management Post Processing Jobs](#)

Can a Data Steward Manager access Source System References?

The Data Steward Manager role with Manage Party Center Source System References privilege can access Source System References.

Navigate to either:

- **Customer Data Management > Organizations**, click any organization and click the **Source System References** tab.
- **Customer Data Management > Organizations**, click any person and click the **Source System References** tab.

How Source System Confidence Levels Work With Survivorship Rules

You can use source system confidence levels for creating survivorship rules. Survivorship rules are used to retain master records during merge, insert, or update operations.

Source system confidence levels

You can import data from legacy or source systems into the application. The legacy or source systems usually store data associated with the same attributes across systems. Similarly, multiple source systems may have data related to the same account.

Source system confidence levels let you indicate how much you trust the data from a specific source system for an attribute. For example, you may trust the customer address data coming from a financial system more than the same data from a marketing system. Similarly, you may trust the employee name data coming from the Human Relationships system more than the same data coming from the Marketing system. While specifying source system confidence levels, you must ensure that only the most reliable data is selected as the master data.

Survivorship rules

Oracle CX Sales and Fusion Service uses a central data model updated by authorized users from multiple applications. Often, different applications or source systems update the same data resulting in a data conflict.

Survivorship rules are custom business rules that determine how conflicts should be automatically resolved while merging or updating duplicate records from different source systems or applications. For example, you can create a survivorship rule to select the latest customer address data when there are duplicate records.

Relationship between source system confidence levels and survivorship rules

Source system confidence levels enable you to build your survivorship rules to resolve duplicate data associated with specific attributes. For example, you could create survivorship rules to:

- Select the record from a source system with confidence values of 80 and above as the master record.
- Automatically reject records from source systems with confidence values of 30 and below.

Synchronization of Attribute Change History for New Attributes

When a new attribute is configured for source confidence, you can synchronize the survivorship on update with that attribute's change history. Synchronization is relevant for the first-time a given attribute is configured with source confidence. Changes to an attribute's existing source confidence setup don't require synchronization. Synchronization isn't required to track changes later.

Here's how you synchronize an attribute's source history:

1. In the Setup and Maintenance work area, go to the following:
 - o Offering: Customer Data Management
 - o Functional Area: Customer Hub
 - o Task: Manage Source System Confidence
2. Click Synchronize.
The sync dialog provides information about the most recently run synchronization job.
3. Select the Object you want to synchronize on the Synchronize Attribute Source History.
4. You can select the **Recommended synchronization start date** option or select **Specify the synchronization start date** option and specify a date.
5. (Optional) Select **Send Notifications** to receive notifications when the synchronization job completes.
6. Click **Submit**.

Note: The time taken for this process to complete depends on the number of records to be processed. If this process is taking a long time complete, you can view Last Sync Date and Sync Request ID columns and refresh the page to see the progress. You can also go to the Scheduled Processes page to check the status using the Sync Request ID.

Why didn't my saved searches migrate to my target environment?

Only saved searches created at the site layer are migrated from the test environment, which is the source, to the production environment, which is the target. Saved searches created at the user or job role layers from the source aren't copied to the target. So, you need to manually create the saved searches at the user and job role layers in the target environment. For more details, see [Contents of the Migration Set](#).

How do I run the Request Revenue Territory Assignment scheduled process?

Use the Request Revenue Territory Assignment scheduled process for territory-based opportunity assignment. This scheduled process evaluates opportunity revenue lines and matches eligible territories and their salespeople to the revenue lines.

When to Use

This scheduled process:

- Runs territory-based assignment on opportunity product lines. During this process, the application evaluates every product line in the opportunity batch. Territories whose dimensions match the dimensional attributes of a given product line are then assigned to that line.

Privileges Required

Verify that you have the following roles or privileges:

- Roles:
 - Sales Administrator
 - Setup User

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency
 - See the table containing the view criteria information in the Parameters section.
- Compatibility:
 - This scheduled process is incompatible with itself. These scheduled processes should not be requested to run in parallel against the same opportunity batch, to avoid potential locking issues.
 - High volume opportunities and revenue lines impact the performance.
 - We recommend that you don't run multiple instances of this scheduled process in parallel.

Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
View Criteria Name	Mandatory	Specify a view criteria name from the View Criteria table.	See the View Criteria table.	None	Not applicable
View Criteria Bind Values	Optional	Specify the view criteria bind values of the associated view criteria name from the View Criteria table.	See the View Criteria table.	None	Not applicable
Number of Work Objects per Sub Process	Optional	Specify the number of work objects per sub process.	Recommend that you use the default values.	None	Not applicable
Maximum Sub Processes per Process	Optional	Specify the maximum number of sub processes per process.	Recommend that you use the default values.	None	Not applicable
Metrics Logging Interval	Optional	Specify the metrics for logging interval.	Recommend that you use the default values.	None	Not applicable

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Refresh Forecast Automatically	Optional	Specify of the forecast must be refreshed automatically.	Recommend that you use the default values.	None	Not applicable
Diagnostic Mode	Optional	Used only for troubleshooting purposes.	Not applicable	None	Not applicable

If the view criteria is relevant for your business, use the information in the Recommended Run Frequency column. Typically, most implementations don't use all of the view criteria.

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
OpenOpportunities ByCreationDate	Revenue lines of open opportunities created in the last 90 days. Note that the view criteria bind values aren't required for the default date range, 90 days. You can pass a different date range by entering View Criteria Bind Values.	<code>BindOpptyCreationDateTo=[date],BindOpptyCreationDateFrom=[sysdate-90]</code> For example: <code>BindOpptyCreationDateTo=2015-02-29, BindOpptyCreationDateFrom=2015-01-01</code> For example: <code>BindOpptyCreationDateFrom=2015-01-01, BindOpptyCreationDateTo=[sysdate]</code> This second example processes all open opportunities created between January 1, 2015, and the current date.	Daily
OpenOpportunities ByEffectiveDate	Revenue lines of open opportunities that have an expected close date in the last 90 days. Optionally, you can enter a different date range.	<code>BindEffectiveDateFrom=[sysdate], BindEffectiveDateTo=[sysdate+90]</code> For example: <code>BindEffectiveDateFrom=2015-01-01, BindEffectiveDateTo=2015-02-29</code>	Daily
SalesAccountUpdated InLastNDays	Revenue lines of all open opportunities whose sales account was updated in the last 30 days. Optionally, you can enter a different number of days.	<code>BindSalesAccountUpdatedSince=[30]</code> For example, opportunities whose sales account was updated in last 15 days: <code>BindSalesAccountUpdatedSince=15</code>	Daily
SalesAccountUpdatedInLastNHours	Revenue lines of all open opportunities whose sales account was updated in the last number of	<code>BindSalesAccountUpdatedSince=[number of hours]</code> For example, opportunities whose sales account was	Multiple times per day

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
	hours. Optionally, you can enter a different number of hours.	updated within last 6 hours: BindSalesAccount UpdatedSince=6	
OpenOpportunitiesUpdatedInLastN	Revenue lines of all open opportunities updated within the last four hours. Optionally, you can enter a different number of hours.	- BindOpptyUpdatedWithinHours - For example, open opportunities updated within the last 6 hours: BindOpptyUpdatedWithin=6	Multiple times per day
OpenOpportunitiesUpdatedInLastNDays	Revenue lines of all open opportunities updated in the last 30 days. Optionally, you can enter a different number of days.	- BindOpptyUpdatedSince=[30] - For example, open opportunities updated in last 15 days: BindOpptyUpdated Since=15	Daily
FilterByBatchTag	Revenue lines of all open opportunities that contain a specific value in the Batch Tag field.	- BindBatchTag =[text] - For example, open opportunities that have EMEA in the Batch Tag field: BindBatchTag =EMEA	Run on need basis as per business requirements
RevenueImportCriteria	Revenue lines of all opportunities imported through the given bulk import batch ID. The view criteria bind value, BatchId, is mandatory.	- BindBatchId - For example: BindBatchId=5618782	Run on need basis as per business requirements
ClosedOpportunitiesByCreationDate	Revenue lines of closed opportunities created in the last 90 days. Optionally, you can enter a different date range.	- BindOpptyCreationDateTo =[date], BindOpptyCreationDateFrom =[date] - For example: BindOpptyCreationDateTo =2015-02-29, BindOpptyCreationDateFrom =2015-01-01	Daily
ClosedOpportunitiesByEffectiveDate	Revenue lines of opportunities closed in the last 90 days. Optionally, you can enter a different date range.	- BindEffectiveDateFrom =[date], BindEffectiveDateTo =[date] - For example: BindEffectiveDateFrom =2015-01-01, BindEffectiveDateTo =2015-02-29	Daily
FilterByOpptyNumber	Revenue lines of an opportunity with a specific number.	- BindOpptyNumber=<number> - BindOpptyNumber=17001	Run on need basis as per business requirements. Usually run while troubleshooting in diagnostic mode.

Troubleshooting Information

Use this information to troubleshoot the scheduled process:

- Warning or errors are displayed and details are captured in the scheduled process.
- Use the Diagnostic mode for detailed analysis.
- Use the Batch Assignment Progress Report or the Batch Assignment Error Report to view the details. For more information about these reports, see the Related Topics section.

Related Topics

- [What is a Batch Assignment Progress Report?](#)
- [What is a Batch Assignment Error Report?](#)

How do I set up duplicate identification simplified profile options?

You can configure the duplicate identification simplified profile options in the Setup and Maintenance work area.

Navigate as follows:

- Offering: Customer Data Management
- Functional Area: Customer Hub
- Task: Manage Customer Data Management Options

Click the Duplicate Identification tab.

You can use these profiles options to specify:

Tuning

You can use this group of profile options to fine-tune the performance of your duplicate identification processes. The profile options under this category are:

- Enable Real-Time Key Generation
- Number of Batch Key Generation Jobs
- Number of Batch Matching Jobs
- Number of Real-Time Possible Duplicates

Advanced Options

You can use this set of profile options to configure diagnostic profile options that aren't related to the standard configuration activities. The profile options under this category are:

- Batch Duplicate Identification Debug Level
- Enable Fine Logging for Match Value Conversion

You can find more details about the duplicate identification simplified profile options in the individual topics about them.

How can I schedule a saved duplicate identification batch?

You can schedule a saved duplicate identification batch by searching for it on the Duplicate Identification work area and editing its processing options.

What happens when I delete an account?

When you delete an account, the entire record is removed from the sales application and can't be restored.

In general, when you delete an account:

- The account party status becomes inactive in the database.
- The deleted account doesn't appear in the accounts list, account search, account list of values, account data quality match, segmentation, and recent items.
- The deleted account's profile and children, such as attachments and notes, can no longer be viewed.
- The account's contact relationships, if any, are deleted. The contact can still be viewed, but deleted contact relationships aren't shown in the contact.
- Deleting an account doesn't delete account-related objects, such as opportunities, leads and tasks. You can still view related objects and the account name on these objects, but you can no longer access the deleted account's details.

Related Topics

How do I view audit reports?

You can use the Audit Reports work area to view changes to the application data, such as the business objects that were created, updated, and deleted.

To view the history or to create a report, you must have a role with the View Audit History (FND_VIEW_AUDIT_HISTORY_PRIV) privilege assigned to it. For appropriate assignment of roles and privileges, check with your security administrator.

Audit Events

Transactional events in the application trigger the audit process based on the create, update, and delete operations. For events to trigger the audit process for the business objects, you must first enable the objects for auditing.

These are the events that trigger the audit process.

Transactional Event	When the Audit Activity is Triggered	Audit Report Content
Create	Whenever business object data is created and stored in the database	- Name of the created object - Name of the user who created the object - Time of creation
Update	Whenever the existing business object data is updated	- Both old and updated values of the object - Name of the user who updated the object - Time of updating
Delete	Whenever the existing business object data is removed from the database	- The last value that the object attributes contained - Name of the user who deleted the object

The event details are stored in the audit table. The attributes of the audited object data can be used in lookups and foreign keys to display values in the audit history. The application supports displaying the audited information according to the language settings configured.

For Oracle Fusion Middleware products, events such as failed sign-in attempts are used as triggers. In absence of an audit table, the information is stored in the sandbox and presented only in English.

Note: This topic focuses on the create, update, and delete event types available in Fusion Applications. For details on events used in the Oracle Fusion Middleware products, refer to the Oracle Fusion Middleware documentation. See: *Introduction to Oracle Fusion Middleware Audit Framework*

View Audit Reports

You can view the audit report for the business objects that are enabled for auditing. Remember, to view the history, or to generate a report, you must have a role with the View Audit History (FND_VIEW_AUDIT_HISTORY_PRIV) privilege assigned to it.

1. Click **Navigator > Tools > Audit Reports**.
2. On the **Audit Reports** page, specify the search criteria.

Here's what some of the search criteria are for:

Search Parameter	Description
Product	Displays all the products that are available for auditing. Note: The checkboxes in the Search Results section are enabled or disabled based on the product selected.
Business Object Type	- Narrows the search results to a specific business object, within the selected product. - Enables the Show User-Related Details, Show Attribute Details, and Show Additional Object Identifier Columns checkboxes in the search results.

Search Parameter	Description
	Note: If you're generating the audit history report of a scheduled process, you must select the Business Object Type for your product. Otherwise, you'll get a blank report.
Include child objects	- Displays all the child objects that were listed for a business object when audit was set up. For example, a sales order object that contains several items as child objects. - Objects are displayed at the immediate parent-child level only. To view the children at subsequent levels, select the child object as the business object type and search again.
Include attachment details	This checkbox is displayed only when you select a business object associated with attachments. - Displays additional event types for attachments in the Event Type list. These event types include the check-in, checkout, and download options for the attachments. - Based on the selection, information about the check-in, checkout, and download actions done on attachments are displayed in the search results.
Show User-Related Details	Displays the user ID. Note: For legacy data, also displays the name and ID of the impersonator who updated the objects during an impersonation session.
Show Attribute Details	- Enables the attribute list so that you can select either all attributes, or a specific attribute to view the changes. - Based on the selection, the search results indicate whether an attribute is created, updated, or deleted, and the corresponding old and replaced values.
Show Additional Object Identifier Columns	- Displays the instances (contexts) in which the business object was used. - The context values identify the objects and the transactions in which they were used. Each context is unique and assigns a unique description to the business object.

For example, to get the audit report for all the insert and update operations of the business object type *Item*, belonging to the product *Product Hub*, use these search parameters:

- From the **Product** list, select **Product Hub**.
- From the **Event Type** list, select **Object Data Insert** and **Object Data Update**.
- From the **Business Object Type** list, select **Item**.

You can also specify any other details from the search criteria.

3. Click **Search**.

In the Search Results section, you can see the audit report.

Tip: You can also select the check boxes in the Search Results section and refine the search results to view more information.

Can I move a customer registry from one account address set to another?

No, you can't update the account address set.

What are the different statuses of a scheduled process?

After you submit a scheduled process, it can go through many statuses until it reaches a final state.

This table explains the statuses you might see. The Action Required column tells you if something can be done for the process:

- **No (in progress):** The process was submitted and hasn't reached a final state yet. But you or administrators don't need to do anything to move the process along.
- **Yes:** You or administrators need to do something to get the process to another status.
- **No (final):** The process has reached a final state, and nothing else can be done.

Status	Description	Action Required?
Blocked	At least one other running process is incompatible with and currently blocking your process. The situation will be automatically fixed.	No (in progress)
Canceled	The process was canceled, and you can't restart it.	No (final)
Canceling	The process is currently moving to the Canceled status.	No (in progress)
Completed	The main part of the process completed, and postprocessing (such as sending notifications and generating output) has started.	No (in progress)
Error	The process finished running and ended with errors.	No (final)
Error Auto-Retry	The process ended with errors but will automatically run again.	No (in progress)
Error Manual Recovery	The process ended with errors and requires an administrator to move the process to a final state.	Yes

Status	Description	Action Required?
Expired	The process didn't run and its schedule already ended. You can't restart it, but you can resubmit with the same parameters or submit a new process.	No (final)
Finished	The process ran based on a schedule, and it's either a process set or a process that causes other processes to automatically run. Either way, all processes involved are done running.	No (final)
Hold	The process is put on hold and needs someone to release it before it can continue running.	Yes
Paused	The process is paused so that another process that was automatically kicked off can run first.	No (in progress)
Pending Validation	Some validations, for example related to security, are performed on the process before it runs.	No (in progress)
Ready	The process passed validation and is about to start running.	No (in progress)
Retrying	The process resulted in an error but will try again. It will automatically rerun at the time you see in the Scheduled Time column on the Scheduled Processes Overview page. The number of retries depends on how the job is set up. After all the retries, if the process still can't run successfully, it will end with the Error status.	No (in progress)
Running	The main part of the process is currently running.	No (in progress)
Schedule Ended	The last submission in a schedule has happened for a process that's either a process set or a process that causes other processes to automatically run. Either way, all processes involved have started running, but might not be done yet.	No (in progress)
Succeeded	The process successfully completed.	No (final)
Validation Failed	The process failed validation.	No (final)
Wait	The process passed validation but isn't running yet.	No (in progress)

Status	Description	Action Required?
Warning	The process finished running and ended with a warning, for example, that a notification wasn't sent.	No (final)

Is there any feature which creates a customer in the Oracle CX Cloud whenever the suppliers are updated in the Oracle Procurement Cloud.

No, there isn't any ready to use feature which creates a customer in the Oracle CX Cloud whenever the suppliers are updated in the Oracle Procurement Cloud.

You can manually recreate customers in Oracle Sales Partner Relationship Management using the suppliers' details from Oracle Procurement Cloud.

Why does the creation of partner users from the Manage User Details UI fail?

Creation of partner users from Manage User Details UI can fail for various reasons. However, you can click **Resubmit** and run the **Submit Pending LDAP Requests** schedule process to create the user account.

What is the Japanese translation of seed data for ZPM_SALES_CHANNEL?

Here's the meaning of the lookup code for ZPM_SALES_CHANNEL in English and it's translated meaning in Japanese:

- ZPM_DIRECT_CHANNEL_TYPES:
English: Direct
Japanese: ##
- ZPM_INDIRECT_CHANNEL_TYPES:
English: Indirect
Japanese: ##
- ZPM_PARTNER_CHANNEL_TYPES:

English: Partner

Japanese: #####

Can I remove the Reject Comments dialog box while rejecting a deal?

You can't remove the **Reject Comments** dialog box while rejecting a deal because currently out of the box Reject isn't supported without comments.

How do I upload a new logo for a partner?

You can create a theme for a partner and upload a new logo for that partner using the Appearance tool. Here are the steps:

1. Click on Navigator.
2. Under **Configuration**, select **Sandboxes**.
3. Enter the appropriate sandbox. Click on **Appearance** under **Tools**.
4. On the **Themes** page, you can create a theme for each partner and upload a new logo for that partner.

You can provide the partner with the URL that includes the theme name which will display the logo for that partner.

Can a partner user be given quota and access to forecast?

You can't give quota and access to forecast to a partner user, such as a partner sales representative. According to security console's Functional Policy and Data Security Policy, partner users do not have grants for Forecast and Quota setups.

Why am I not able to access another partner account for a user?

As a partner user, you only get access to your own Partner accounts. Hence, you aren't able to access another partner account for a user.

However, it depends on your configuration. Here's how you can check the user specific access:

1. Click on the **Settings and Actions** menu and go to **Setup and maintenance**.

2. Search for the **Manage Sales and Services Access** task.

The Sales and Service Access Management page appears.

3. Click on the **Explore Access** tab and fill the required fields.

Now you can see the accesses related to the selected object.

How do I hide the Primary Address label after enabling multiple addresses for the admin layout?

If you are seeing the Primary Address label after enabling multiple addresses, here's how you can resolve it for the admin layout:

1. Click on the Navigator and select **Sandboxes** under **Configuration**.
2. Click the Enter Sandbox icon to enter the appropriate sandbox.
3. Click on the Navigator and select **Partners** under **Partner Management**.
4. Select **Page Composer** under **Tools**.
5. Click your user image or name in the global header and select **Edit Page** from the **Settings and Actions** menu.
6. Click on the **Select** tab.
7. Select the **Primary Address** field and click **Edit Component**.

The **Component Properties** box appears.

8. Deselect the **Show Component** check box.
9. Click **Apply** and then **OK**.

How do I hide Primary address label for partner profile for non-admin layouts?

You can follow these steps to hide **Primary address** label for partner profile for non-admin layouts:

1. Remove the conditions and change the order of the current layout to hide the address label for the admin user using Page Composer.
2. Make another layout visible to the admin user. This ensures that the other layout is the first to match the admin user conditions.
3. Configure using Application Composer and assign Conditions to Page Layouts.

This way, the address labels will be hidden for all non-admin users.

How can I ensure no duplicate opportunities exist?

As a Channel Account Manager for the deals that are pending approval, you can use **Check for Duplicates** action on the **Edit Deal Registration** page to search for any potentially matching unassigned opportunities.

Note: This step is a part of deal registration. There is no separate check for duplicate opportunity in Opportunity Objects.

Can I provide visibility of private notes for a particular user role?

No, other roles can't view your private notes. Only you can view the private notes for which you are the author.

If you want other user roles to view your note, make sure you don't select the **Private** check box when you create a note.

Can I convert an opportunity to a deal?

Converting Opportunity to Deal Registration is not supported yet. However, you can convert a deal to an opportunity after it is approved by the Channel Manager.

How do I save formatting while managing paysheets?

Here's how you can save formatting while managing paysheets:

You can create a sandbox, use Page Composer to resize and rearrange your columns on the paysheet, and then publish the sandbox.

How do I use multiple rate tables in one plan?

Here's how you can use multiple rate tables in one plan:

You can set up rate table 1 at the performance measure level and then use that output into the plan component's incentive formula with rate table 2.

How do I define a rate table with dates as the dimension type?

Here's how you can define a rate table with dates:

You can convert the dates to a numeric value and use number tier to use dates as the dimension type.

How do I include a performance measure within a user-defined query?

Here's how you can include a performance measure:

You can pass a performance measure, such as `formula_id`, as an input into the user-defined query.

How do I set the prompt order for a specific period in Oracle Transactional Business Intelligence?

Here's how you can set the prompt order for a specific period in Oracle Transactional Business Intelligence:

You can display only the periods that you want, such as periods for a specific year, by setting the display period data in participant reports on the Manage Open Period Process page. Alternately, you can also change the choice list values for the prompt and use option.

How do I revert a single transaction in obsolete status?

Here's how you can revert a single transaction in obsolete status:

Run the Revert Transaction scheduled process for the period to revert only that specific transaction and any credits and earnings that were associated with that transaction.

How are plan components impacted by incentive types?

Here's how plan components are impacted by incentive types:

When creating a payment batch, you can configure the list of values. You can filter the incentive type to pay the plan components with the specific type such as standard, commission, and bonus.

How do I run rule-based assignment on opportunities?

Use the Request Opportunity Resource Assignment scheduled process to run rule-based assignment on opportunities. During this process, assignment processing executes a set of rules, as defined in the profile option, Sales Team Member Assignment Rule Set Group, to find matching candidates for opportunities.

If matching candidates are found, they're added to the opportunity team. Note that team members for whom lock assignment is disabled will be replaced if they no longer match the assignment rules.

When to Use

This scheduled process:

- Assigns sales resources to an opportunity based on a set of rules such as assigning sales team members, including the opportunity owner.

Privileges Required

Verify that you have the following roles or privileges:

- Roles:
 - Sales Administrator
 - Setup User

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency
 - See the table containing the view criteria information in the Parameters section.
- Compatibility:
 - This scheduled process is incompatible with itself. These scheduled processes should not be requested to run in parallel against the same opportunity batch, to avoid potential locking issues.
 - High volume opportunities and revenue lines impact the performance.
 - We recommend that you don't run multiple instances of this scheduled process in parallel.

Parameters

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
View Criteria Name	Mandatory	Specify a view criteria name from the View Criteria table.	See the View Criteria table.	None	Not applicable
View Criteria Bind Values	Optional	Specify the view criteria bind values of the associated view criteria name from the View Criteria table.	See the View Criteria table.	None	Not applicable

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Number of Work Objects per Sub Process	Optional	Specify the number of work objects per sub process.	We recommend that you use the default value.	None	Not applicable
Maximum Sub Processes per Process	Optional	Specify the maximum number of sub processes per process.	We recommend that you use the default value.	None	Not applicable
Metrics Logging Interval	Optional	Specify the metrics for logging interval.	We recommend that you use the default value.	None	Not applicable
Refresh Forecast Automatically	Optional	Specify if the forecast must be refreshed automatically.	We recommend that you use the default value.	None	Not applicable
Diagnostic Mode	Optional	Used for troubleshooting purposes.	Not applicable	Not applicable	Not applicable

If the view criteria is relevant for your business, use the information in the Recommended Run Frequency column. Typically, most implementations don't use all of the view criteria.

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
OpenOpportunitiesUpdatedInLastNDays	All open opportunities which were updated in the last 30 days. Optionally, the user can enter a different number of days.	- BindOpptyUpdatedSince=[3 - For example, opportunities updated in last 15 days: BindOpptyUpdatedSince=15	Daily
OpenOpportunitiesUpdatedInLastNHours	All open opportunities which were updated in the last number of hours. Optionally, the user can enter a different number of days.	- BindOpptyUpdatedWithinHours=[6 - For example, opportunities updated within the last 6 hours: BindOpptyUpdatedWithin=6	Multiple times per day
OpportunityForImport BatchVO	All opportunities imported through the given bulk import batch ID. Value for BatchId is mandatory.	- BindBatchId - For example: BindBatchId=5618782	Run on need basis as per business requirements
OpenOpportunitiesByCreationDate	Open Opportunities created in the last 90 days. Optionally, the user can pass a different date range.	- BindOpptyCreationDateTo=[date], BindOpptyCreationDateFrom=[date] - For example: BindOpptyCreationDateTo=2015-02-29,	Daily

View Criteria Name	View Criteria Description	View Criteria Bind Values	Recommended Run Frequency
		BindOptyCreation DateFrom=2015-01-01 or BindOptyCreation DateFrom=2015-01-01. This second example processes all open Opportunities created between January 1, 2015 and the current date.	
OpenOpportunities ByEffectiveDate	Open opportunities that have an expected close date in the last 90 days. Optionally, the user can pass a different date range.	- BindEffective DateFrom [sysdate] , BindEffective DateTo[sysdate [90] - For example: BindEffective DateFrom=2015-01-01, BindEffective DateTo=2015-02-29	Daily
SalesAccountUpdated InLastNDays	All open opportunities whose sales account got updated in the last 30 days. Optionally, the user can pass a different number of days.	- BindSalesAccountUpdated Since [30] - For example, opportunities whose sales account was updated in last 15 days: BindSalesAccount UpdatedSince=15	Daily
ClosedOpportunities ByCreationDate	Closed opportunities created in the last 90 days. Optionally, the user can pass a different date range.	- BindOptyCreation DateTo [date], BindOptyCreation DateFrom [date-90] - For example: BindEffective DateFrom=2015-01-01, BindEffective DateTo=2015-02-29	Daily
ClosedOpportunitiesBy EffectiveDate	Revenue lines of opportunities closed in the last 90 days. Optionally, the user can enter a different date range.	- BindEffectiveDateFrom =[date], BindEffectiveDateTo =[date] - For example: BindEffectiveDateFrom =2015-01-01, BindEffectiveDateT o=2015-02-29	Daily
OpportunitySearchbyOptyNumber	The opportunity with a specific number.	- BindOpportunityNumber=<nu - For example, BindOpportunityNumber=1700	Run on need basis as per business requirements

Troubleshooting Information

Use this information to troubleshoot the scheduled process:

- Warning or errors are displayed and details are captured in the scheduled process.

- Use the Diagnostic mode for detailed analysis.
- Use the Batch Assignment Progress Report or the Batch Assignment Error Report to view the details. For more information about the reports, see the Related Topics section.

Related Topics

- [What is a Batch Assignment Progress Report?](#)
- [What is a Batch Assignment Error Report?](#)

How do I set the default account type?

You use the Account Type Default (ZCA_DEFAULT_ACCOUNT_TYPE) profile option to set up the default account type.

To set the profile option:

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance** work area.
2. Click the **Tasks** menu and click **Search**. Search for the **Manage Customer Center Profile Options** task and open it.
3. Search for the profile code, ZCA_DEFAULT_ACCOUNT_TYPE.
4. Change the profile value to the account type that you want to be the default.
5. Click **Save and Close**.

Note: Create an account after you logout and login to the application.

How do I populate a field based on the value of another field, such as a picker?

You can make a field value depend on the value of another field in Visual Builder Studio, by creating an action chain and a listener. Follow the example in the topic [Make Values of a DCL Field Dependent on the Values of Another Field](#).

How can I implement a create trigger in Oracle Sales in the Redwood User Experience?

To create dependent fields in Oracle Sales in the Redwood User Experience, you must instead create an action chain in Oracle Visual Builder Studio. See the example in the topic [Make Values of a DCL Field Dependent on the Values of Another Field](#).

Where do BIP reports get saved and can I change the location?

By default, Business Intelligence Publisher (BIP) report outputs generated through scheduled processes are automatically stored in the BIP database tables. You can specify alternate destinations when you schedule the report. Output destinations include email, FTP, and content servers.

How do I change a field into a link in Oracle Sales in the Redwood User Experience?

To create a link from a field in the Oracle Sales in the Redwood User Experience, you create and apply a field template to the field in Oracle Visual Builder Studio. By applying the field template, you can link a contact directly to a LinkedIn profile, for example.

See the topic *Control How a Field is Rendered with Field Templates* in the Extending Oracle Cloud Applications with Visual Builder Studio guide.

How do I purge Sales activities?

In the Sales application, 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. You might want to purge some of the data.

Activities that get tracked include email exchanges, notes, call logs, past and future tasks, and appointments, and recent updates to the record itself. The application tracks these activities on accounts, opportunities, contacts, and leads.

How are activities purged?

The Activities Purge scheduled process eliminates activity records that are no longer pertinent to daily operations. This prevents the Adaptive Search index from being cluttered with unnecessary information.

The relevance of these activities is decided by rules set by individual object teams. The purge process specifically targets activity entries that were generated when users interacted with records, such as making field-level changes or creating or updating notes, tasks, or appointments. It doesn't affect the actual parent or child object records, only the entries in the activity stream that meet the defined purge criteria are removed.

Note: When the parent object record is deleted, the process automatically purges all the corresponding activities. The activities that are removed by the process can't be retrieved.

When the Activities Purge Scheduled Process Runs

The Activities Purge scheduled process runs automatically once a week.

Criteria for Purging Activities of Parent Records

By default, all the activities of parent records and the corresponding child records that meet the criteria shown in the following table are purged.

Note: You can set specific criteria for child and related objects, if needed.

Default Purge Criteria for Parent Objects

Object	Default Criteria
Leads	All Leads where the STATUS IN (RETIRED or UNQUALIFIED) AND LAST UPDATED DATE value is greater than or equal to three years.
Opportunities	All Opportunities where the STATUS IN (LOST; NO SALE ; WON) AND LAST UPDATED DATE value is greater than or equal to three years. .
Accounts	Accounts that are inactivated (soft deleted).
Contacts	Contacts that are inactivated (soft deleted).

Criteria for Purging Activities of Child Records

The following table shows the default criteria used for the purge of related and child objects for activities (tasks and appointments), notes for all top-level sales objects, which are: Account, Contact, Lead, and Opportunity.

Default Purge Criteria for Child Objects

Parent Object	Child Object	Requirements
All Sales Objects: - Accounts - Contacts - Leads - Opportunities	Activity Type = Appointment	All activities of ACTIVITY TYPE IN (APPOINTMENT) AND END DATE is greater than or equal to three years.
	Activity Type = Task	All activities of ACTIVITY TYPE IN (TASK) AND STATUS IN (CANCELLED; NOT STARTED; IN PROGRESS ; ON HOLD) AND DUE DATE is greater than or equal to three years.
	Notes	All Notes where the Last Updated Date is greater than or equal to three years.
	Audit Log	Not purged.

How can I make the opportunity Analytics subtab show only information on a specific opportunity?

You can add the Is Prompted filter to the report to display data specific to an individual record. Here's the full procedure for adding the Analytics subtab and configuring the analytics report for the Classic version of Sales.

1. Set the "Is Prompted" filter in the analytic in Business Intelligence. This step is used when the requirement is to view contextual data specific to the record selected.
2. Enable the sub tab on the object page.
3. Add the analysis to the subtab on the object page.

All of these steps are done using the Opportunities landing and edit pages. You can use these same steps for any of the object pages listed as analytics work areas in the subtable at the start of this section.

For service, the Service, Work Order, and Queue pages use the same procedures.

Set the "Is Prompted" Filter

For analytics to show on your user Opportunity pages you enable the "Is Prompted" filter on the name or object ID for the analysis. Adding this filter adds an analytic with data that relates only to the opportunity your user is currently viewing.

1. Open an existing analysis, or create a new analysis in BI.
2. In the report Criteria subtab, select the Filter icon for the appropriate column. Under Operator, select **is prompted**. Leave the other options blank.
3. Click **OK**.

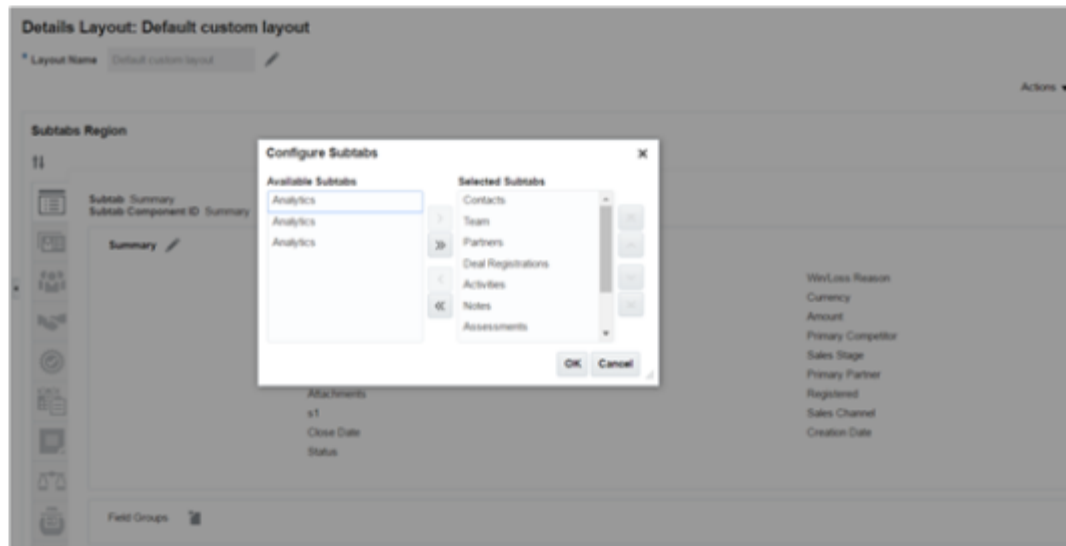
Enable Object Edit Page Analytics Subtabs

This procedure uses the Opportunity object landing page as an example. The procedure is the same for all object edit pages.

1. In Navigator click Application Composer.
2. Select **Sales** from the Application drop-down list.
3. Expand **Standard Objects** and go to **Opportunity**.
4. Under Opportunity click **Pages**.
5. Under **Detail Page Layouts** copy the standard layout or select an existing created layout where the Analytics sub tab is added.

6. Click the Reorder sub tab.

This shows the Configure sub tab option for the edit object page.



7. Click **OK**.
8. Click **Done**. The Analytics sub tab now shows on the Edit Opportunity page.

Add Analytics to Edit Object Subtabs

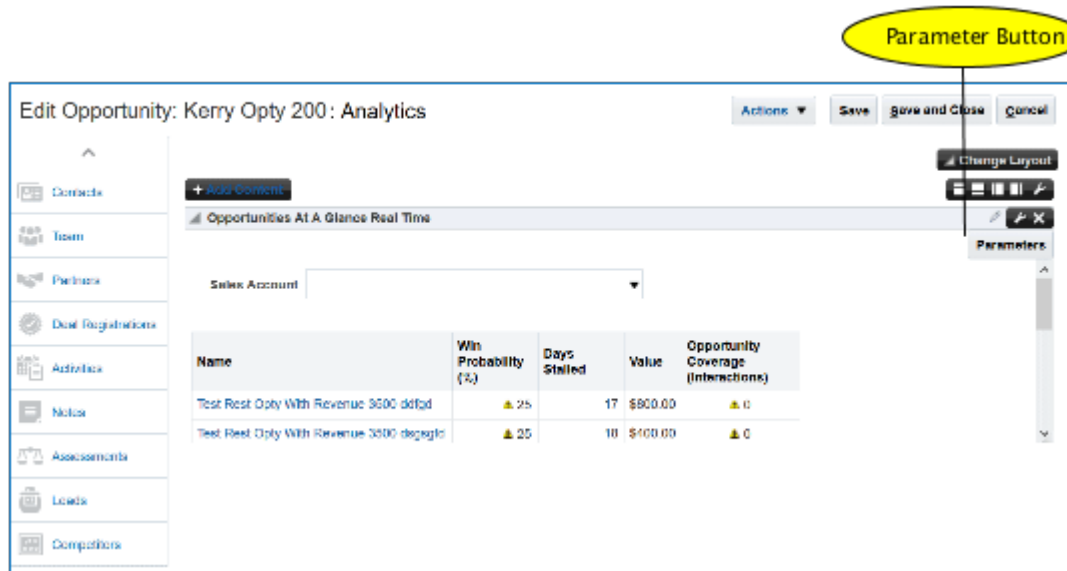
The final step is to add an analysis to the Edit Object sub tab you've just enabled. When an analysis is added to the object page, it shows data specific to the signed in user's transaction record. The specific data shows because of the "is prompted" filter being set in the analytic which passes parameters from the transaction record to the analytic. A parameter is visible in the analytic when a filter prompt is added.

1. At the top of the Home Page click the arrow next to your name and select Edit Pages. The Edit Pages dialog appears.
2. Select **Job Role** and choose the role to which your change should apply. Any analytics you add in this context apply only to the role you define here.
3. In Opportunities on the analytics sub tab click **Add Content** and navigate to the analysis you want to show on the Opportunity page.
4. Click **Add** next to the analysis and close the dialog. The analysis is now added to the Analytics sub tab.

- Next step you want to either save the default parameters, or add parameters specific the object you are working with.

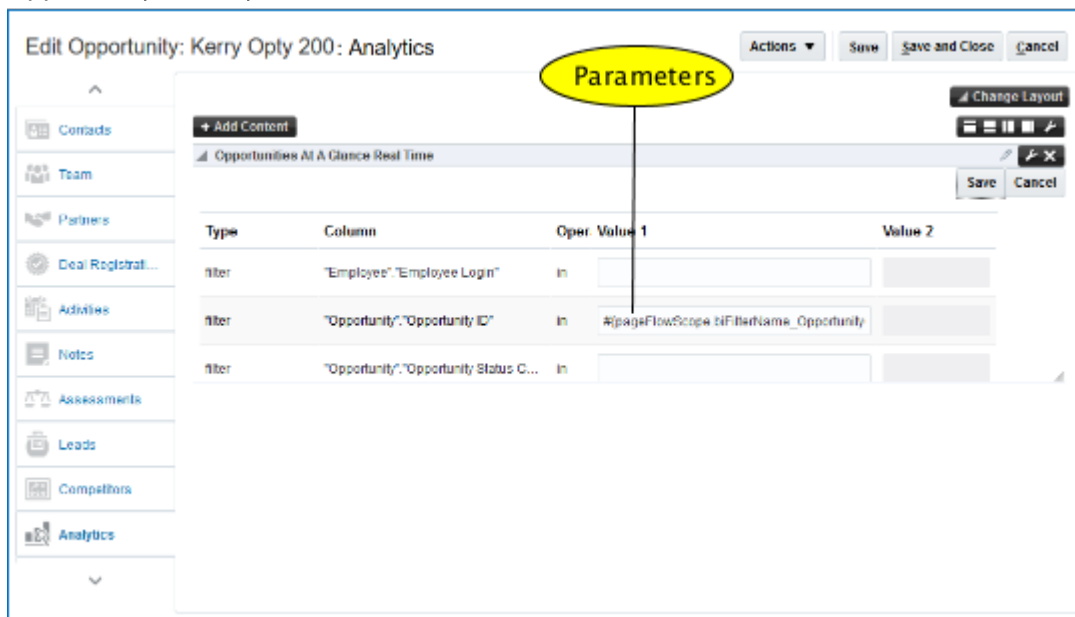
Click **Parameters**.

This shows the Parameters button on the Edit Opportunity analytic.



- The parameter used is `pageFlowScope` variable and is set by default for Opportunity, Leads, Partners, Service Request and custom object pages. For example, in the case of Opportunity the parameter is `#pageFlowScope.biFilterName_OppportunityOppportunityId`. In the case of Service Request it's `"#{pageFlowScope.biFilterName_ServiceRequestServiceRequestId}"`. If for any reason the parameter field is blank, insert the variable manually and save it.

This shows the parameter value of `#pageFlowScope.biFilterName_OppportunityOppportunityId` on an Edit Opportunity ID analytic column `..#pageFlowScope.biFilterName_OppportunityOppportunityId` on an Edit Opportunity ID analytic column.



7. For the objects that aren't prepopulated with the `pageFlowScope` parameters, you can use one of these `sessionScope` variables depending on which object page you're on, and the columns available in the analytic.
- Customer ID: `#{sessionScope.zcmAnalyticsCustomerId}`
 - Contact ID: `#{sessionScope.hzAnalyticsContactPartyId}`
 - Contact Name: `#{sessionScope.hzAnalyticsContactName}`
 - Lead ID: `#{sessionScope.mklAnalyticsLeadId}`
 - Opportunity ID: `#{sessionScope.mooAnalyticsOpportunityId}`
 - Partner ID: `#{sessionScope.zpmAnalyticsPartnerId}`

How come I'm unable to see Visual Builder Studio in all of my environments?

Visual Builder Studio (VBS) is available in the Test environment only. You must develop your extensions in the Test environment and then you can migrate them to other environments. But VBS will still remain in only one environment.

Related Topics

- [Overview of Using Visual Builder Studio](#)

How can I increase the size of a text field with multiple lines of text on the page?

In the classic Oracle Sales, you can't control the size of a long text field on the page. The size is set dynamically. In Oracle Sales in the Redwood User Experience, you can use Oracle Visual Builder Studio to create field templates to control the size of text fields on the page.

See the topic [Control How a Field is Rendered with Field Templates](#) in the Extending Oracle Cloud Applications with Visual Builder Studio guide.

Is quota setup data included in the configuration package used to migrate setup data?

No. Oracle Sales quota setup information, including Quota Seasonality Groups, Sales Goals, and Quota Plans, isn't included in migration sets used for moving configurations from a source environment to the target environment.

How do visibility code values impact who can view and access sales lead notes?

Visibility code values identify who can view and access the notes associated with a sales lead. When creating lead notes, the visibility code value defaults to Internal. Other visibility code values include Private and External.

Here's an explanation of the meaning and effect that setting each of the visibility code values have for sales lead notes visibility.

Visibility Code	Effect
PRIVATE	Visible only to specific users or user groups. This visibility level provides a higher degree of control over who can access and view specific notes, allowing for more granular permission management within the organization based on roles, responsibilities, or specific needs.
INTERNAL	Visible only to users within your organization. This visibility level restricts access to notes to individuals or teams within your company, ensuring that internal discussions, comments, or information related to the lead remain confidential from external parties.
EXTERNAL	Visible to users outside of your organization, such as partners, vendors, or other external stakeholders. This visibility level allows for collaboration with external parties involved in the sales process, enabling communication and sharing of relevant information about the lead.

See the related topic for more information.

Related Topics

- [Can I set custom object data visibility based on security roles?](#)

Can I change the columns displayed in the contacts list page in Oracle Visual Builder Studio?

You can't change the columns displayed on list pages using Visual Builder Studio (VBS), but you can change the columns displayed on the list pages by creating saved searches. Using saved searches, you can create different default list pages for different job roles in your 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?*.

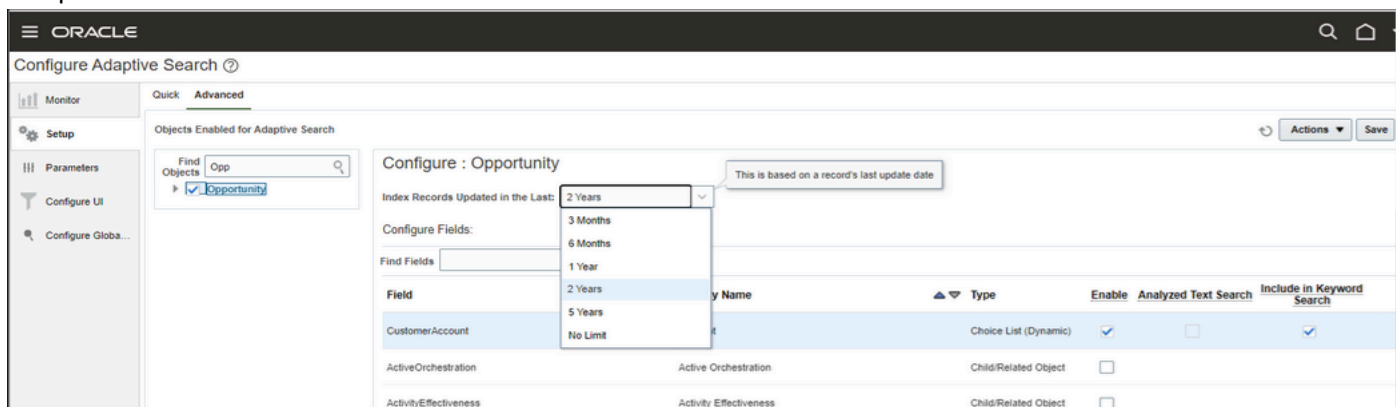
How do I set the time limit to keep indexing updated records in Adaptive Search?

You can set a duration to keep indexing updated records for your objects in Adaptive Search by editing the **Index Records Updated in the Last** parameter from the **Configure Adaptive Search** task. The duration you select is based on a record's last update date and you can also choose to set no time limits.

You can only choose to change current and default advanced parameter values if you've the required privileges for your business objects. You must have a custom role with the ZCA_ADAPTIVE_SEARCH_EDIT_PARAMS_PRIV privilege to view and access the Advanced setup parameters of Adaptive Search.

Here's how to edit the **Index Records Updated in the Last** parameter for your business objects.

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to:
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o Task: Configure Adaptive Search
3. On the **Configure Adaptive Search** page, click the **Setup** > **Advanced** tab.
4. In the **Find Objects** field, search for the object you want, for example, Opportunity as shown in the following sample screenshot.



5. From the **Index Records Updated in the Last** drop-down list, select the duration that you want to keep indexing records in Adaptive Search. You can select from the following:
 - No limit
 - 1 Year
 - 2 Years
 - 5 Years
 - 3 Months
 - 6 Months

Note: The variations in the time it takes for the successful completion of the publish process is mainly due to the volume of data, the number of objects enabled, and the number of attributes selected for each object. See the topic *Why is my Adaptive Search publish process taking time to complete?* for more information about the performance impact of setting no duration limit.

6. Click **Save** and this will trigger a full publish.
7. Verify your changes after the full publish completes.

How can I prevent a specific role from creating an account in Oracle Sales in the Redwood User Experience?

You can prevent users from creating accounts by removing the create privilege from their job roles using the Security Console.

Adding filters to smart actions doesn't remove the ability to create records in the Redwood User Experience.

Related Topics

- [How do I edit job or abstract roles?](#)

How do I extract the time part of the DateTime field?

You can extract time part of date fields using Groovy.

You can use the following

getAt():

- ActivityStartDate.getAt(Calendar.HOUR);
- ActivityStartDate.getAt(Calendar.MINUTE);
- ActivityStartDate.getAt(Calendar.SECOND);

substring():

- ActivityEndDate.format("yyyy-MM-dd HH:mm:ss").toString().substring(10,12)

For UserTimeZone value, you can use the following Groovy:

- `def value = ActivityEndDate`
- `def user_time_zone = oracle.apps.fnd.applcore.common.ApplSessionUtil.getTimeZone();`
- `def dateFormat = 'MM/dd/yyyy hh:mm:ss a'`
- `def UTZ_ActivityEndDate = value.format(dateFormat, Time zone.getTimeZone(user_time_zone));`

How come formula fields I created aren't available in Visual Builder Studio?

A formula field is a computed attribute, and exists only at runtime. This is a transient type of attribute that doesn't persist in the database as a table column. You can't search on formula fields and you can't use them in analytics reports. Formula fields, including text formula fields, aren't available in Oracle Visual Builder Studio.

Related Topics

- [Formula Fields](#)

How do I export logs for the Microsoft 365 for Oracle Sales Redwood UX add-in?

Use the steps outlined in this topic to export logs for the Microsoft 365 Integration for Oracle Sales Redwood User Experience (hereafter called Microsoft 365 for Redwood UX) add-in. These logs help the support team troubleshoot issues.

Before you start exporting the logs, open your Outlook mailbox in a web browser. See [Get Started with the Add-In](#) for more information.

Exporting Microsoft 365 for Redwood UX Logs

1. Start monitoring the logs by navigating to **Menu > Settings > General** and clicking **Start Monitoring**.
2. Click **Search** and find the Contact that requires the logs for troubleshooting. Here we search for **Microsoft Viva** contact and select it.
3. Stop monitoring the logs by navigating to **Menu > Settings > General** and clicking **Stop Monitoring**.
4. Select **Export Logs** and save the logs on your device.

You can now share these logs with the support team.



How do I export Oracle CX Sales Mobile app-related logs?

Use the steps outlined in this topic to export and attach the application logs to your service requests. These logs help the support team troubleshoot issues with the CX Sales Mobile application.

In your CX Sales Mobile app, follow these steps to export logs:

Exporting CX Sales Mobile Logs

1. Start monitoring the logs by navigating to **Menu > Settings > General** and clicking **Start Monitoring**.
2. Navigate to Sales Leads by navigating to **Menu > Sales Leads**.
3. Search for and select the lead that you want logs for.
4. Stop monitoring the logs by navigating to **Menu > Settings > General** and clicking **Stop Monitoring**.
5. Select **Export Log** and save the logs on your device.

You can now share these logs with the support team.



How do I use the Data Visualization Configuration tool?

The Data Visualization Configuration tool helps you visualize Oracle Transactional Business Intelligence (OTBI) reports and saved searches. Using this tool, you can create different visualizations, including bar charts, scatter charts, and more.

To create the data visualization, you need to:

1. *Create an OTBI Analysis Report or a Saved Search*
2. *Create Detailed Reports and Interactions*
3. *Design the Presentation of your Data*

Create an OTBI Analysis Report or a Saved Search

This section covers:

- Creating an OTBI analysis report
- Creating a Saved Search

Creating an OTBI analysis report

For this example, we'll create an OTBI analysis report on Customer Overview in CRM:

1. Navigate to **Navigator > Tools > Reports and Analytics > Browse Catalog**.
2. Create a new analysis by navigating to **Create > Analysis > CRM-Sales-Customer Overview**. You can create the analysis based on any existing areas.

3. Select the required details in the relevant **Subject Area**. Tailor the analysis report by defining report details such as Customer Name, Customer Row ID, and Opportunity ID.
4. Select the required details in the **Subject Area**. You can also add pipeline facts such as Number of Customers and Number of Opportunities.
5. Optionally, you can set your styling preferences. Switch to the **Results** tab and select the **Content Paging** option.
6. Select **Enable Alternate Styling** and **Repeat in Each Row** options.
7. Once you're satisfied with the report, click **Save**.

Creating a Saved Search

You can create a custom saved search based on existing searches and modify filters according to your requirements. For this example, we'll create a saved search on demos, based on the **My Open Opportunities** existing search.

1. Navigate to **Navigator > Workspace**.
2. Select **Opportunities** from the drop-down and select **My Open Opportunities**.
3. Search for `demo` in the search box.
4. Optionally, you can select **Set as my default saved search**.
5. You can define who can access this saved search from the listed access groups. For this example, select **Everyone** from the drop-down.
6. Click **Create**.



Create Detailed Reports and Interactions

To create an interaction with the visualization, you need to create a custom detailed report and link it to the interaction.

Creating a Detailed Report

1. Navigate to **Navigator > Tools > Reports and Analytics > Browse Catalog**.
2. Edit the created analysis report.
3. Switch to **Criteria** tab.
4. You can tailor the displayed information. For this example, add Employee Name from the **Subject Area** options.
5. Save this report in the same path as the created OTBI analysis report.

Creating an Interaction

1. Click **Settings** in the Customer Name column, and then select **Column Properties**.
2. Select the **Interaction** tab.
3. Select **Action Links** in the **Primary Interaction** area.
4. Click **Add Action Link**.
5. Click **Create New Action** on the New Action Link window.
6. Select the **Navigate to BI Content** option.
7. Navigate to the location where the detailed report is stored, and then select it.
8. Select **Options** and ensure that **Open in New Window** option is selected.
9. Select the **Do not display in a popup if only one action link is available at runtime** option.
10. Click **Ok**.
11. Save the report.



Design the Presentation of your Data

This topic covers:

- Creating the visualization from the OTBI analysis
- Creating the visualization from the Adaptive Search
- Editing or Deleting the Visual Configuration

Creating the visualization from the OTBI analysis

With the OTBI analysis report and the detailed report, you can now create the Visualization configuration.

1. Navigate to **Visualization Configuration**.
2. Add a new configuration by navigating to **Navigator > Configurations > Application Composer > Visual Configuration > Add**.
3. Select the source type as **OTBI Analysis**.
4. Search for and select the created OTBI analysis report.
5. You can choose from Visualization types such as Bar chart, Combo chart and more. For this example, select **Bar Chart**.
6. You can change the type of data visualized on the axes, the chart orientation, and layout. For this example, select **Name** on **X-axis** and categorize it by **Opportunity ID**.
7. Select the type of orientation for the visualization from the **Vertical** and **Horizontal** options.
8. You can filter the information based on different column parameters. For example, you can select the **Owner** parameter and select the **Owner's name**.
9. Create an interaction by searching for and adding the detailed report.
10. Create the visualization.
11. Once you're satisfied with the visualization created, you can set the status as **Active**.
12. You can now interact with the bar chart.

Creating the visualization from the Adaptive Search

1. Select the source type as **Adaptive Search**.
2. Navigate and select the created saved search.
3. Configure the visualization as required.
4. Once you're satisfied with the visualization created, you can set the status as **Active**.
5. You can now interact with the visualization to view the detailed visualization insights.

Editing or Deleting the Visual Configuration

When the visualization is active, Source Type, Visualization, and Source cannot be changed. To make these changes, do the following:

1. From the **Status** drop-down list, select **Inactive**.
2. Click **Update**.
3. From the **Status** drop-down list, select **Draft**.
4. Click **Update**.
5. You can now edit or delete the visualization.
6. You can delete the configuration in one of the following ways:
 - Click **Delete** on the configuration draft page.
 - Click **Delete** from the configuration list.



Why can't formula fields be configured in Oracle Adaptive Search?

Formula fields can't be configured in Oracle Adaptive Search because they aren't searchable and can't be indexed.

How can I generate output from Oracle BI Publisher without column headers?

You can create an e-text template to eliminate column headers from your output from Oracle Business Intelligence Publisher (BI Publisher).

For more information see the [Creating e-Text Templates](#) topic in the Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher guide.

What role does a user need to cancel a scheduled active report job in Oracle Business Intelligence Publisher (BIP)?

Users with the BI Administrator role can cancel a scheduled active report job.

Is it possible to add links or icons that map to external sites from the UI?

Yes, depending on your requirements, sales administrators can add deep links or mashup content to a page so that you can simply click a link or icon to go directly to the application pages or an external sites without any additional clicks or navigation.

For example, you can add deep links to a business intelligence report or to an email notification, or you can copy a URL from the Deep Links page and use it to create a link on your company website. You can embed default Workspace deep link URL patterns for the supported and custom objects to any web page as a link. Your sales and service users can go directly to the details of the corresponding record within the context of Workspace. See [Configure Deep Links for Workspace](#) for more details.

With a mashup, you can view and use an external web application without having to leave your application. For details about how to embed mashup content to a page, see [Overview of Mashups](#).

What factors are used for calculating account engagement levels from Sales Insights?

Salespeople can view an objective understanding of the engagement level of accounts based on detailed analysis of account interaction and historical exchanges. Interactions include phone calls, web conferences, or wrap up calls you had with your customers or prospects and this data is used by Sales Insights to measure and rate the overall level of engagement of your accounts.

Each account is assigned an account engagement level score and its calculation is based on the frequency and count of Account related Activities, Interactions, Leads, Opportunities, and Service Requests for a given Account. The higher the score, the more engaged the account is. With Sales Insights, you can view at a glance, which accounts have high, moderate and low engagement levels.

You can access sales insights from the **Profile** tab on the **Accounts** page. You can easily identify those accounts that are either highly or moderately engaged and this helps to:

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

Engagement level are based on factors such as the number of active leads, the number of deals, the frequency of interactions and activities with the account and so on.

Here's a table that outlines some factors that influence the 3 account engagement levels with some sample scenarios:

Level	Criteria	Scenario
Highly	Accounts that have a high number of records and activities recently updated or newly created.	If you've many accounts to manage, then you can use this information to prioritize your sales efforts. For example, you might decide to focus on accounts with a high number of open activities or touches, as these accounts are more likely to be ready to move forward in the sales process.
Moderate	The number of accounts that have several records and activities recently updated or newly created is between the Highly and Lonely totals of engagement levels.	If you note that an account has a moderate number of interactions, you might infer that the account is in the early stages of the buying process and that you should focus on building relationships with the contacts. Or you might identify potential opportunities for these accounts. By seeing the number of interactions and activities that have taken place

Level	Criteria	Scenario
		with different contacts within an account, you get a better sense of which opportunities are most likely to close.
Lonely	Accounts that have no records and activities recently updated or newly created since X days/weeks. For example, {activity/interaction/lead/opty/SR since X days/weeks} where X denotes a quarter of the average sales cycle time.	You can identify which accounts need more attention. If you see that an account has a low number of open activities, touches, or emails sent, then this insight level might alert you to increase your engagement with the account.

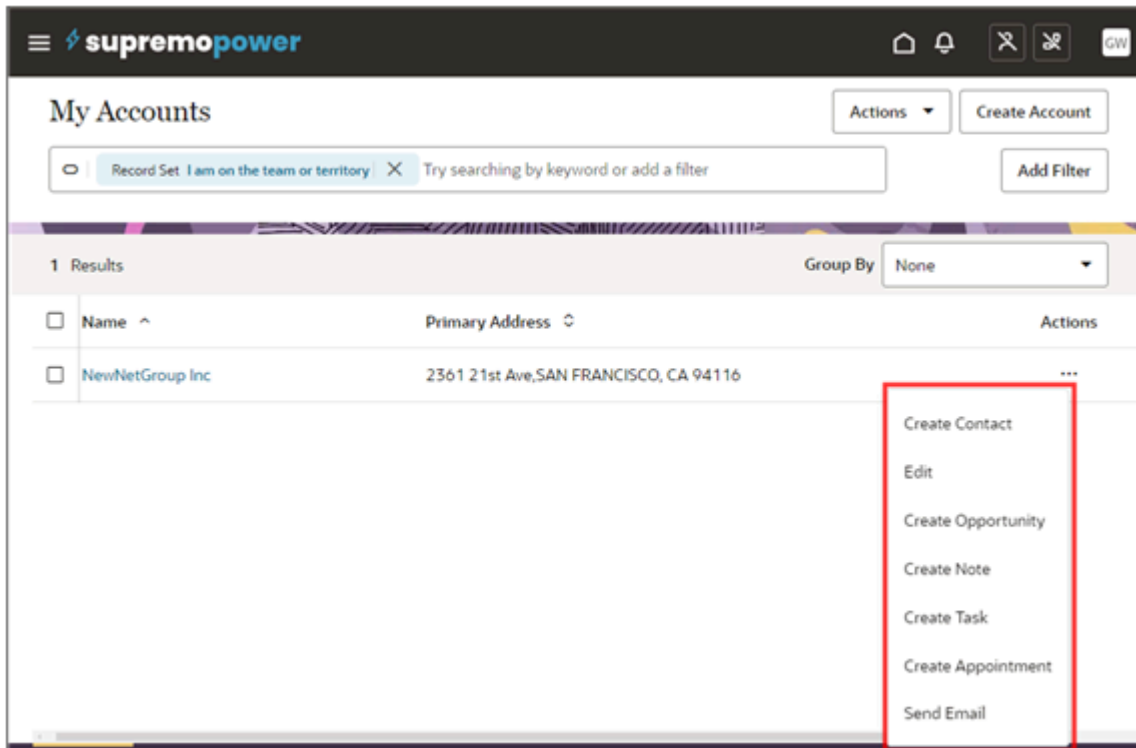
Related Topics

- [Overview of Sales Insights](#)
- [View Account Engagement Level From Sales Insights](#)

Why isn't my smart action available in the list page search bar when I selected list page as the UI?

On the Oracle Sales in the Redwood User Experience list pages, smart actions appear in the list of actions for individual records listed on the page. They aren't available in the search bar.

On list pages, smart actions appear in the Actions list next to each individual record as highlighted in the following screenshot.



How do sales resources (team members) get assigned to an opportunity?

Sales resources (team members) are assigned to an opportunity either automatically by the assignment process, or when you add them to the sales team while editing an opportunity.

See these related topics for more information.

- [About Sales Resources and Opportunity Assignment](#)
- [How do I assign team members automatically to an opportunity?](#)
- [How do I run rule-based assignment on opportunities?](#)

Can I add a custom field that's associated with an opportunity to the lead convert page?

Yes, you can create a custom field for an object and associate it to another object to suit your specific to your business needs. Let's say you want to use an existing custom field that's associated with your opportunity and want to add the custom field so that it's displayed on the lead convert page as part of your leads to opportunity conversion process.

Here are the high-level steps to follow:

1. Create a custom field in Application Composer for both the Opportunity and Sales Lead objects.
2. Use the predefined mapping **Copy Lead to Opportunity Map** to populated the Opportunity custom field with the Lead custom field.

See these related topics for more information and examples:

- *How do I copy custom fields from one object to another?*
- *Enable a User-Defined Copy Lead To Opportunity Map Value*
- *Example of Modifying the Lead to Opportunity Copy Map*

Can I add a button with an action on the list page in Oracle Sales in the Redwood User Experience?

No, you can't add buttons to the list pages. All of the smart actions available on the list pages are tied to the individual records displayed in the list. There are no global smart actions available.

Can I add a text entry field to the confirmation dialog for a smart action in Oracle Sales in the Redwood User Experience?

No, you can't add a text entry field to the confirmation dialogs for smart actions. Dialogs aren't extensible.

Which layout templates in Oracle Visual Builder Studio do I use to configure the Product Catalog page?

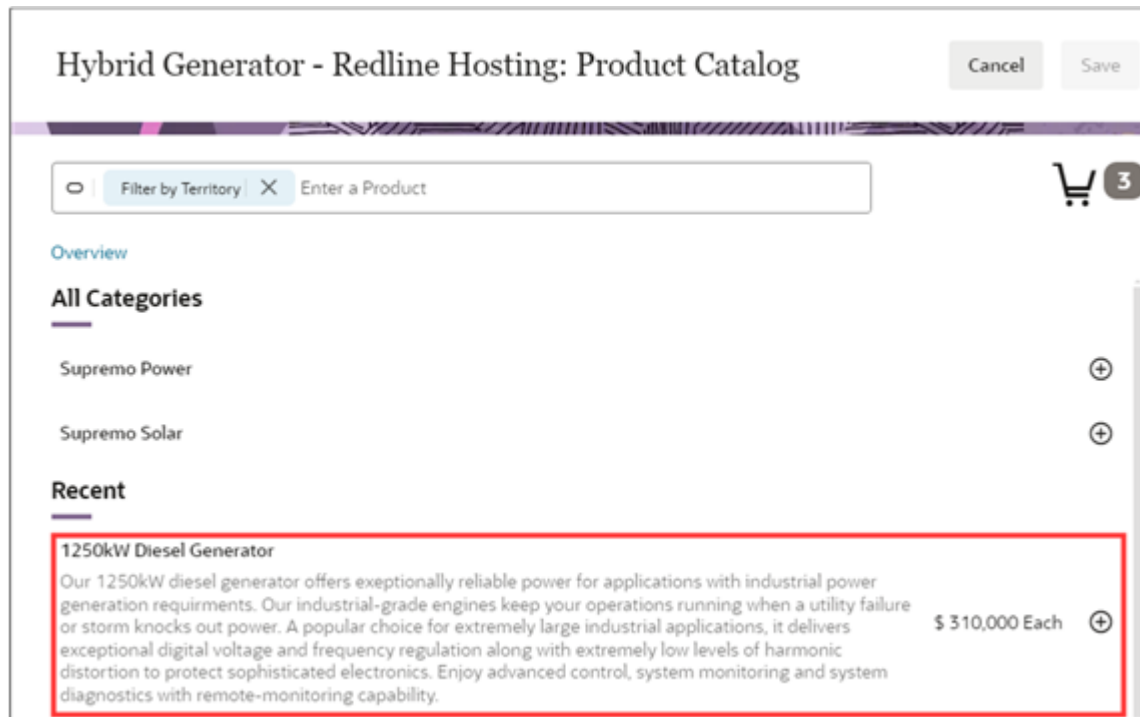
There are three product layout templates that control the layout of the product catalog salespeople browse in opportunities in Oracle Sales in the Redwood User Experience.

Here's an overview of the layout templates and what portion of the Product Catalog pages they control:

- **Product Card Layout**

Layout for the short product description that appears on the Product Catalog page.

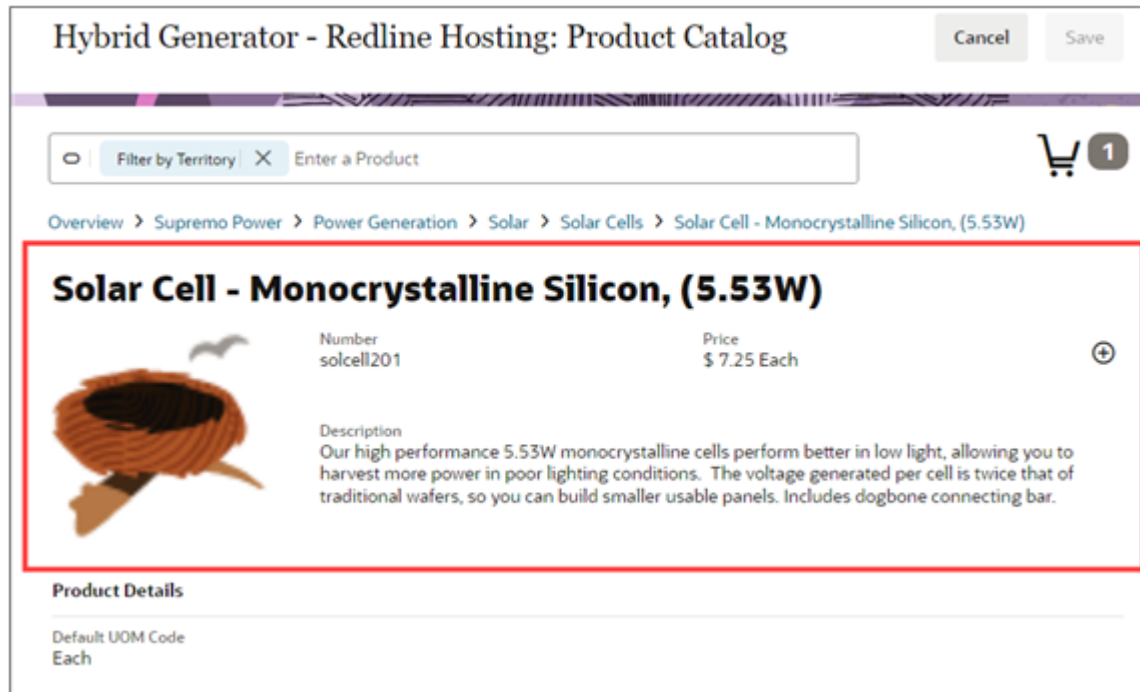
You can add two additional custom fields to the layout in **item 4** and **item 5**.



- **Product Overview Layout**

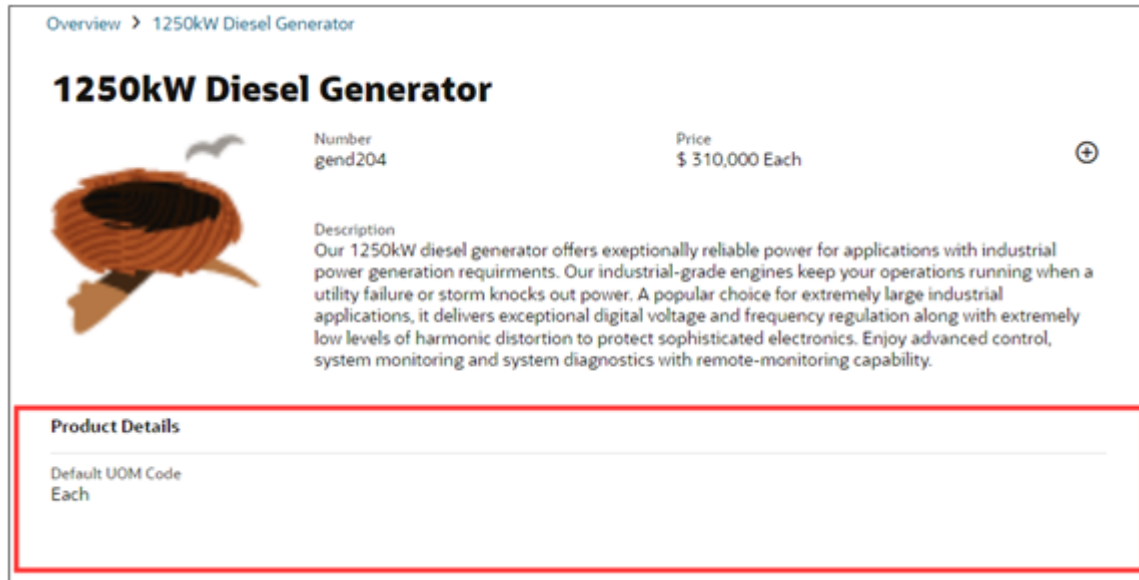
This layout controls what information displays in the product information section when users drill down into a product from the catalog.

This layout is fixed. You can't add any custom fields. While you can substitute fields in principle, any substitution will affect the application functionality.



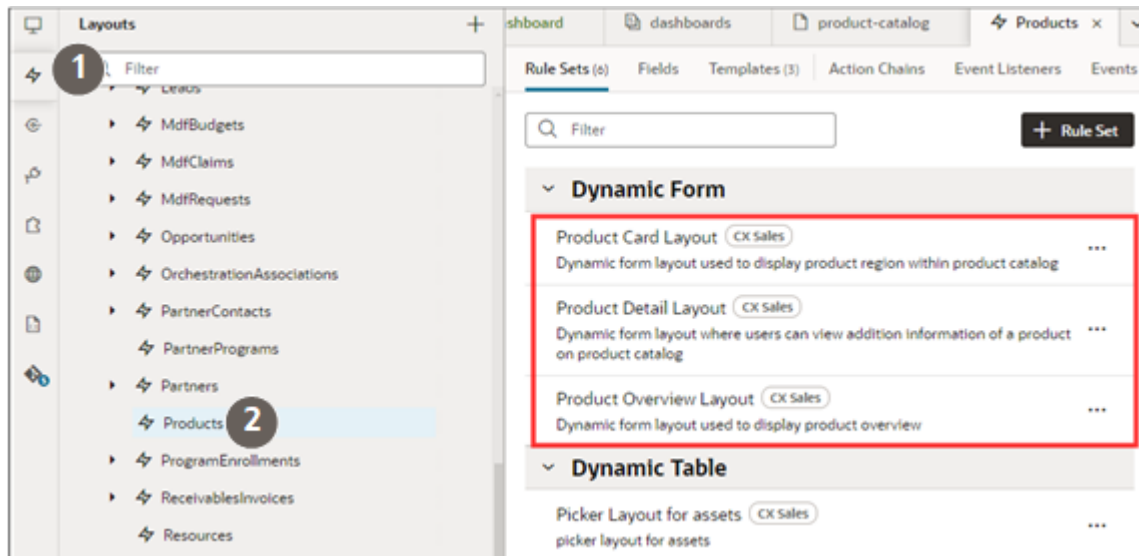
- **Product Detail Layout**

This layout controls the region of the product drill-down page under the **Product Details** heading. The layout is extensible. You can add any number of custom fields.



Here's how to access the layouts:

1. Open Oracle Visual Builder Studio.
2. Click the **Layouts** tab (callout 1 in the screenshot).
3. Open **CX Sales** node and click **Products** (callout 2). The relevant layouts are listed in the **Rule Sets** tab under the **Dynamic Form** heading.



How can I get a report on which users are provisioned with the security roles provided by Oracle?

You can create a report of users and the security roles assigned to them and then filter by the roles provided by Oracle. All of the codes for predefined roles start with the prefix "ORA_".

See the following topics for more information:

- [User Role Membership Report](#)
- [User and Role Access Audit Report](#)
- [Oracle Support Document 1933748.1 \(How to Report on Users and Roles Assigned to Them\)](#)

Can we still use our OTBI reports when we switch to Oracle Sales in the Redwood User Experience?

Yes, you can continue to use your Oracle Transactional Business Intelligence (OTBI) reports and your saved searches. You can expose both OTBI reports and saved searches in the Sales Dashboard using Oracle Visual Builder Studio.

For details, see the [How do I configure the Sales dashboard?](#) playbook.

How do I import my category data?

You can use Import Management to create, update, or delete your category data.

You can import category records using these steps:

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

How You Map Your Source Data to Target Object Attributes

You import category data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.

- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .csv file for a successful import.

Before You Start

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

- You've completed all the prerequisites for importing each attribute in your source data.
- You've all parent records in place before importing child records.

Review Required Attributes and Validations for Category Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for category records, prerequisite setup tasks and specific validations, if any:

Review Required Attributes and Validations for Category Object

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating a Category Record	Updating an Existing Category Record	Deleting an Existing Category Record
CategoryId	The unique identifier of the category, an auto generated number and primary key for this table.	Must be a valid CategoryId when updating a category.	Not Required	Conditionally Required. Provide value if CategoryCode isn't provided.	Conditionally Required. Provide value if CategoryCode isn't provided.
CategoryCode	The public unique identifier of the category.	Must be unique across all business units and application stripes.	Required	Conditionally Required. Provide value if CategoryId isn't provided.	Conditionally Required. Provide value if CategoryId isn't provided.
CategoryName	The name of the category. This field is displayed in the service request UI.	None	Required	Not Required	Not Required
CategoryShortName	A short code for the category.	This field is automatically set with the same value as the CategoryCode.	Not Required	Not Required	Not Required
StripeCd	The application stripe of the category.	Must be one of the following values: ORA_SVC_CRM, ORA_SVC_HCM, ORA_SVC_HRHD, ORA_SVC_ISR.	Conditionally Required. Provide value if you don't want the default value of ORA_SVC_CRM.	Not Required	Not Required
BUOrgId	The unique identifier of the business unit associated with the category.	Manage Business Units under Setup and Maintenance.	Required	Not Required	Not Required
ParentCategoryId	The unique identifier of the parent category.	Parent category must exist in the application.	Conditionally Required. Provide	Not Required	Not Required

Attribute	Description	Prerequisite Setup Tasks or Import Validations	Creating a Category Record	Updating an Existing Category Record	Deleting an Existing Category Record
			value if importing a child category and ParentCategoryCode isn't provided.		
ParentCategoryCode	The public unique identifier of the parent category.	Parent category must exist in the application.	Conditionally Required. Provide value if importing a child category and ParentCategoryId isn't provided.	Not Required	Not Required

You can view the Category object along with all its child objects and attributes in the Manage Import Objects page of the Import Management flow. You can find attribute information like type, length, description, and so on, on this page.

Note:

1. If you're importing child categories, you must make sure that the parent category already exists in the application.
2. To import category name for non primary languages, you must change the session language before importing. You can change the session language by navigating to **Settings and Actions > Set Preferences > Language and Changing the Value for the Current Session**.

Create the Source CSV File

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

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

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

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

Create the Import Activity

After the CSV file is ready, create an import activity to import the category information. To create an import activity:

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

Review the Import Results

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

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

How do I import sales lead data?

Use this topic to import Sales Lead data into Oracle Applications Cloud. You can use the import functionality to create, update, or delete Sales Lead records.

To import Sales Lead records, perform the following tasks:

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

Use the Contact time zone field to save the preferred time zone of a contact pursued on your sales lead. The contact time zone is based on the contact address and helps you know the preferred time to call or email a prospect or customer. You can also use the functional "who" columns to save the record history of a sales lead. The columns let you accurately report on sales leads that are imported from other systems.

Other sales lead management features help to align marketing and sales objectives from sales lead generation to sales lead execution. Sales Lead information is generated from a variety of sources and obtained from:

- A company's existing contacts
- Marketing campaigns

All sales leads then undergo the qualification and assessment process and are qualified either manually by a salesperson or automatically based on predefined rules. Finally, qualified sales leads are converted into opportunities.

How You Map Your Source Data to Target Object Attributes

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

You must do the following before creating the .csv file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .csv file for a successful import

To better manage your sales lead information, the sales lead object has the following child objects:

- Sales Lead Contact
- Sales Lead Product
- Sales Lead Resource

If you want to import only a few records, then you can create a single CSV file for all sales lead attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the sales lead child objects. Note that you must have imported the CSV file for sales lead object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.

The preferred options to uniquely identify an object record are as follows:

- **Internal ID:** If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier. Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Sales Lead object, this attribute is `LeadId`.
- **Public unique identifiers:** If you're creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with 'Number' and usually visible in the business object's UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Sales Lead object, the attribute is `LeadNumber`.

Required Attributes and Validations for Sales Lead Object

To import data successfully into Oracle Applications Cloud, your .csv file must include the required attributes. Ensure that you provide valid values for the attributes.

This table lists the required attributes for importing new Sales Lead records, required attributes for updating Sales Lead records, prerequisite setup tasks for the attributes, and specific validations, if any, for Sales Lead import:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead record	Updating an Existing Sales Lead record
AcceptedDate	The date the recommended lead generated by the Sales Prediction engine was accepted by a sales person or lead qualifier to pursue	No validation	A value is required if you specify the value for LeadAcceptedFlag as Y.	Not required
ActionCode	Indicates explicitly the operation to be performed on a row: INSERT to create a new record in the destination tables, UPDATE to update an existing record in the destination table, DELETE to delete the record.	If no value is provided, the record is updated if it already exists. Else, it's inserted	Not required	Not required
ConvertedTm	The date when the lead was converted to an opportunity	No validation	A value is required if you specify the value for Lead StatusCd as CONVERTED.	Not required
LeadName	The name that identifies the lead	No validation	A value is required if you're creating a new lead.	Not required
LeadNumber	The Lead's public unique identifier value	If providing a value to update an existing lead, the value must exist in the column LEAD_NUMBER of the MKL_LM_LEADS table.	If providing a value and creating a new lead, the value must be unique.	A value is required, if updating an existing lead and you're not providing the unique ID of the lead (ObjectKey)
ObjectKey	The unique ID for the existing lead record in the destination table	Automatically generated by the import process if creating new record. If updating an existing record and providing the LEAD_NUMBER, the import process defaults the LEAD_ID.	Do not provide a value if creating a new lead.	A value is required, if updating an existing lead and you're not providing the LeadNumber.
OwnerId	The unique ID for the existing resource party in the destination table. The owner must also be an internal resource included as a member of the lead's sales team	If providing a value, the value must exist in the column PARTY_ID of the HZ_PARTIES table. The value must also exist in the column PARTY_ID of the JTF_RS_RESOURCE_PROFILES table. The identified party must be assigned as a sales team resource for the existing lead or included in the resources imported in the same batch as this record.	A value is required, if creating a new lead and you don't provide the owner's source system code and reference (OwnerOrigSystem and OwnerOrigSystemReference)	Not required
QualifiedDate	The date when the lead was qualified	No validation	A value is required, if you optionally provide the lead	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead record	Updating an Existing Sales Lead record
			status (StatusCd) value as QUALIFIED, indicating that the lead is qualified.	
RejectedTm	The date when the lead was rejected	No validation	A value is required, if you optionally provide the lead registration status (ApprovalStatus) value as REJECTED, indicating that the lead is rejected.	Not required
RetiredTm	The date when the lead was retired	No validation	A value is required, if you optionally provide the lead status (StatusCd) value as RETIRED, indicating that the lead is retired.	Not required

Go to **Navigator > Tools > Import Management > Import Objects**, to see all the attributes of the sales lead object. The page also lists attribute information like type, length, description, and so on.

Note: Sales lead is hard deleted from the system. You can get information about the deleted leads if you have **Audit Reports** enabled while deleting.

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Sales Lead from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next**.
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.

6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

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

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

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [How You Use Alternate Keys to Import Records](#)

How do I implement multi-level approvers for a deal?

You can implement serial approvers for a deal or send the deal for multi-level approvers by using the BPM Task and doing the following:

1. Edit the Human Task Rule. For example **MklDealsApprovalProcessComposite**.
2. Click on **Assignees** and select the participant node. For example **DealRegistrationSerialApproverParticipant**.
3. Edit the participant node. Under the **Advanced** tab, deselect the **Ignore Participant** check box. It should be same for first participant node and with different assignee.

Why am I getting the Error MOW-225237?

You get the error "The assessment template is invalid for the source object. (MOW-225237)" when the custom partner assessment template is added because the template setup is not correct. You can review and confirm your steps during the template setup.

Here are some steps that you can review:

- Using **Manage Partner Center Assessment Template** task to create additional assessment templates.
- Enabling multiple assessments per template by setting the profile MOW_MULTIPLE_ASSESSMENTS_ENABLED to **Yes**. The default setting is **No**.
- Check if the default assessment template for Partner: Customer Inquiries is working properly.

How can I find the version of Oracle Sales UI in my environment?

Enter the following URL, and then search for `oracle_cx_salesUI`:

```
<YourHost>/fscmRestApi/vxmanifest/v2/digests/latest?type=runtime,requirejs-info,app-ui-info,pwa-info
```

Here's a sample of the information you get:

```
"id": "oracle_cx_salesUI",  
"version": "2407.4.66",  
"description": "CX Sales",  
"dependencies": {  
  "oracle_cx_fragmentsUI": "\u003E=2407.0.0"
```

What do I do if a field isn't showing up in VB Studio and I'm getting an error on loading the page?

Ask the Oracle Cloud Applications administrator to enable Cross-Origin Resource Sharing (CORS) by adding the Oracle Visual Builder Studio's root URL to the Oracle Cloud Application's `ORA_CORS_ORIGINS` profile option. This profile option specifies which domains can talk to each other.

Production to Test (P2T) and other operations that replace the database might cause the profile option value to change. If you perform any operation that replaces the database, then you must reset the `ORA_CORS_ORIGINS` profile option using the **Manage Administrator Profile Values** task in Setup and Maintenance.

In the **Site** level, **Profile Value** field, enter `'self'` (including the single quotes), followed by VB Studio's root URL. For example: `'self' https://abcd-test-DEVCSAPP-07012210-2070-abcd.developer.ocp.oraclecloud.com`.

Note: Don't include port numbers, wild cards, or extraneous characters after the root. For example, if the VB Studio's full URL is `https://abcd-test-DEVCSAPP-07012210-2070-abcd.developer.ocp.oraclecloud.com:443/abcd-test-devcsapp-07012210-2070-abcd`, the root is simply `https://abcd-test-DEVCSAPP-07012210-2070-abcd.developer.ocp.oraclecloud.com`.

For details, see the topic [Resolve Access Issues After Allow-Listing Your VB Studio IP Address](#) in the Cloud Infrastructure Documentation.

Why can't the managers in my resource organization see information on their direct reports?

Ensure that each user has a manager in the organization hierarchy. Except for the top of the resource hierarchy, you must have a manager for each user in the hierarchy.

Are geographical items like addresses translated?

No, they're not. However, if you enter the address in, say, Arabic, then that's how it's stored for all languages.

For more information on supported languages in Oracle Fusion applications, see [Language Packs on Your Application](#).

Can I add a deep link to the Activity standard email template?

You can add deep links to a business intelligence report, an email notification, or a company website hosted on Oracle Cloud. Use these deep links to direct users to specific areas in the application so that they don't have to navigate there themselves.

URL Pattern for Deep Links

Here's a typical URL pattern of a deep link:

```
https://<pod-name>/fndSetup/faces/deeplink?
```

```
objType=<objID>&objKey=<name1=value1;name2=value2>&action=<action>&returnApp=<returnappURL>&returnAppParams=<returnAppPa
```

See [Deep Links](#) for more information.

How can I view orders for sales accounts?

The Orders panel in Oracle Sales in the Redwood User Experience isn't supplied by default. But, you can add it using Oracle Visual Builder Studio.

See [Add a Custom Object Panel for Related Objects \(One-to-Many\)](#) for an example of how you can add the panel.

Can I configure the app so that read-only users can comment on activities?

No, you can't. Any user who can update any field must have more than read-only access to the activity.

Why doesn't the status of my test merge request change?

Test merge is one of the types of merge requests.

You can use this option to test the merge request configuration without modifying your application data. It doesn't result in any change in the data and the status of the merge request remains New.

Why do I see the partner user account status as Requested even after I have enabled the user account?

While trying to log in as a partner user, you see the account request status as **Requested** because certain privileges or roles can be missing.

Here's how you can review and add the missing roles or privileges:

1. Login as the administrator.
2. Click **Navigators > Tools > Sales and Service Access Management**.
3. Click the **Explore Access** tab.
4. Enter these details:

User Name: The user name of the partner user account.

Object: Partner

Public Unique Identifier: The public unique identifier of the record you want the partner user to view.

You can review the access to roles and privileges granted to the user by clicking **Explore**.

Run the following processes:

- Send Pending LDAP Requests
- Retrieve Latest LDAP Requests
- Import User and Role Application Security Data

The partner user account login issue should be fixed now.

How can I create foldout and subview on the Account object, establishing a many-to-many relationship with a custom object?

You can use the CX Extension Generator to create the foldout panels and subview for custom objects on the Account object in Oracle Sales in the Redwood User Experience. For details, see the topic [Add Panels and Subviews to Standard Sales Objects](#).

How can I move or change the panels in account detail pages in Oracle Sales in the Redwood User Experience?

You can use CX Extension Generator and Oracle Visual Builder Studio to move and otherwise edit the panels that appear on the record detail pages for accounts and other objects.

For details, see the following topics:

- [Add Panels and Subviews to Standard Sales Objects](#)
- [Change the Display Order of Panels in a Detail Page](#)

How can I create a report that tells me how many times an opportunity close date was updated?

You can use the Sales - CRM Historical Pipeline subject area in Oracle Transactional Business Intelligence to track close date updates. You can use this subject area to track revenue and opportunity transitions.

You must run a scheduled process to collect the data. See the [Sales - CRM Historical Pipeline subject area documentation](#) for details.

Here's a sample report:

```
SELECT

"Sales - CRM Historical Pipeline"."Historical Opportunity"."Effective Date" s_1,

"Sales - CRM Historical Pipeline"."Opportunity"."Effective Date" s_2,

"Sales - CRM Historical Pipeline"."Opportunity"."Opportunity Name" s_3,

"Sales - CRM Historical Pipeline"."Opportunity"."Opportunity Number" s_4,
```

```
"Sales - CRM Historical Pipeline"."Pipeline Snapshot Date"."Pipeline Snapshot Date" s_5,  
"Sales - CRM Historical Pipeline"."Historical Pipeline Facts"."# of Opportunities" s_7,  
FROM "Sales - CRM Historical Pipeline"  
WHERE ("Opportunity"."Effective Date" <> "Historical Opportunity"."Effective Date")
```

Can I do a mass delete of my test environment data?

No, you can't. But, you can purge accounts and contacts (also called *party records*).

For more information, see [Can I purge inactive account and contact data?](#).

Related Topics

- [How do I purge Sales activities?](#)

Can I purge inactive account and contact data?

Yes, you can purge inactive Sales party records (accounts and contacts).

Purge Inactive Account and Contact Records

When users delete an account or contact, the record becomes inactive. You might want to purge these inactive records to prevent them from accumulating in your application. Or, you might need to purge them to comply with data protection regulations.

Here's what you can purge:

- Inactive records within the Sales context
 - **Note:** Inactive Partner records can't be purged, because the Partner object isn't related to Sales.
- Inactive and related merged Sales accounts and contacts with only one Usage. Examples of inactive accounts and contacts with more than one Usage are:
 - A contact who's also a supplier contact
 - A Sales account that also has billing account usage
- You can purge these Sales account record types:
 - SALES_PROSPECT
 - SALES_ACCOUNT
- You can purge these Sales contact record types:
 - CONTACT
 - ORG_CONTACT
 - CUSTOMER_CONTACT

- SALES_PROSPECT
- SALES_ACCOUNT

The purge of inactive account and contact record references – like identifier or name – also removes the references in other Oracle CX applications, such as:

- Opportunities
- Leads
- Campaigns
- Territories
- Assets
- Deals
- Quotes
- Activities
- Notes
- Forecasts
- Business plans
- Contracts

For these flows, the purged records no longer appear on application pages, web service responses, or BI reports.

Note: Merged records can be purged only when the master (survivor) party becomes inactive.

Set Profile Options to Purge Inactive Records

You use two profile options to help you enable and manage purging of inactive records:

- **ORA_HZ_ENABLE_PURGE:** This profile option enables purging of inactive records. By default, this profile option is set to No.
- **ORA_HZ_PURGE_MIN_AGE:** This profile option specifies the number of days after which inactive records can be purged. By default, the value of this profile option is 30 days.
The value of the profile **ORA_HZ_PURGE_MIN_AGE** is displayed as the Minimum Age on the Manage Party Purge Activities page. It's also the default value of the Age By field on the Create Purge Filter page. Modify the value of the profile option **ORA_HZ_PURGE_MIN_AGE** to change the default value of the Age By field.

You can enable these profile options in Setup and Maintenance using the Manage Administrator Profile Values task.

Set Filters and Purge the Data

You must create a filter criterion to purge records. The records that are to be purged are selected based on the filter criteria. So, you can't skip creating filters and proceed to purging records. You can either immediately purge the selected records or schedule the Purge Inactive Party Records scheduled process to purge inactive records later. You must create a filter criterion to purge records.

1. In Setup and Maintenance, go to: **Sales offering Sales Foundation functional area Manage Party Purge Activities task.**

Note: The Purge Enabled field on Manage Party Purge Activities page indicates whether inactive records can be purged, and the Minimum Age field indicates the minimum number of days after which inactive records can be purged. Use the profile options discussed earlier in this topic to change these profile option values, if needed.

2. Click **Actions > Create** to create a purge filter.
3. Specify the purge filter criteria or change the existing filter criteria as required. To purge records on the same day that they were deleted, specify Age By in the filter criteria and the value of the profile option ORA_HZ_PURGE_MIN_AGE as -1.

Note: You can't specify a number less than the number specified in the Age By field. To reduce this Age By value, change the value of the profile option ORA_HZ_PURGE_MIN_AGE to a smaller number.

You can click **Actions > Edit** to edit existing filter criteria. Or, click **Actions > Remove** to remove an existing filter.

4. Select the **Enabled** option to make the filter criterion available for filtering and purging records.

If you don't select this option and simply save the filter, the filter criteria is saved, but it isn't available to filter and purge records.

5. Click **Purge** to immediately purge all the records that currently match your filter criteria. Or, click **Save and Close** to save the filter criteria and purge the records the next time the Purge Inactive Party Records scheduled process runs.

CAUTION: The purged records might not be the same records that appeared in the preview section of the Manage Party Purge Activities page. The records purged are the ones that match the filter criteria when the scheduled process runs.

Related Topics

- [How do I purge inactive data?](#)

How do I construct queries with multiple parameters for the Sales Dashboard fragments in Oracle Sales in the Redwood User Experience?

You can add an unlimited number of query parameters in the Sales Dashboard fragments. The parameters use the AND operator only.

Use the following example as a guide:

```
<oj-vb-fragment-param name="query" value='[[ [
{"type": "savedSearch", "params": [{"key": "queryUuid", "value": "saved-search-query-UUID"}]},
{"type": "qbe", "params": [ {"key": "SalesStage", "operator": "in", "value": ["Sales-Stage-ID"] },
{"key": "RecordSet", "operator": "in", "value": ["ORA_MYSUBORDSSALESTEAMOPTIES"] },
{"key": "StatusCode", "operator": "in", "value": ["OPEN"] }
]
] ]'></oj-vb-fragment-param>
```

For information on how to obtain the saved search Universally Unique Identifier (UUID) and the Sales Stage ID, see the topic *How can I find the UUIDs for a saved search and the IDs for its filters in Oracle Sales in the Redwood User Experience?*

What Assignment Manager attributes can I set for the Territory candidate associated with the Revenue work object?

As you set up work objects and candidate objects in Assignment Manager, you'll also select the attributes of those objects to ensure that candidates are properly assigned to work objects. The attributes you select help decide the mappings and rules which determine how the matching candidate assignment disposition will be carried out.

For example, after you identify the business objects that require assignment and the candidate objects that you'll assign to them, you use attributes to help achieve the best assignments.

Here are some assignment questions to consider when you're deciding what attributes to select and enable.

- Do you want to assign a single resource or multiple resources?
- Do you want to automatically assign matching candidates or run custom logic against matching candidates?
- Do you want to record the matching candidate score on the work object?
- Do you want to retain manually assigned candidates when assignments are processed?
- Do you want to replace disqualified candidates when assignments are processed?

Let's say you want to assign a salesperson (resource) to a business object such as an opportunity, based on the product skill of the salesperson. In this case, when you create the opportunity work object and the salesperson candidate object, you'll select the attributes of opportunity and salesperson that correspond with the product skill. Selecting these attributes makes them available for mappings and for conditions on your rules, so ensure that you select the attributes that reflect the criteria that you want to use for matching business objects to work objects.

Here's a brief summary explanation of the attributes for the territory candidate associated with the revenue work object. A revenue line represents the projected revenue expected from selling a product.

Attribute	Explanation
Assignment Mode	Mode of assignment processing, such as matching or territory.
Assign Candidates	Enable if you want Assignment Manager to perform the assignment of your selected candidate objects. If you decide to deselect this checkbox, then Assignment Manager will search for any matching candidates and then pass the records to the calling application to update the selected work object.
Run Custom Logic	Enable to call a user-defined function during assignment processing. This indicate that Assignment Manager passes the result of the assignment matching to the callback function of the work object. For example, some work objects such as Opportunity uses custom logic that updates the sales team with the territory members. The Territory-Based Assignment (TBA) process stamps the territories onto the revenue line records and adds the territory team members (resources) to the opportunity sales team.
Exclude Assignment Attribute	The value of this column at runtime indicates whether the work object records should be ignored by the Assignment Manager.

Attribute	Explanation
Assignment Date Attribute	Used to stamp a date and time of when the work object record was assigned by the Assignment Manager.
Parent Attribute	The candidate object parent attribute.
Differentiation Attribute	Select the attribute used to differentiate matching candidates for each value of that attribute for the candidate object.
Coverage Attribute	Select the territory attribute used to denote if the candidate in the matching candidate list has a regular, included, or excluded coverage.
Maximum Number of Candidates	The maximum number of candidates is 100.
Merge Assignment Candidates	Enable to indicate whether the matching candidates are to be merged when multiple mapping sets are used during assignment processing.
Team View Object Instance	Select the combined work object and candidate object view instance that captures information for the candidate team.
Assignment Attribute 1, Assignment Attribute 2, Assignment Attribute 3	The first, second, and third assignment attributes on the work object in the Team table.
Replace Candidates	Enable to replace disqualified candidates on the team when an assignment request is run.
Score Attribute	The information used by the assignment processing when scoring a work object. Stores the score on work object in the Team table where the candidate score will be stamped.
Keep Manual Candidates	Enable to retain manually assigned candidates when an assignment request is run.
System Attribute	Select a system attribute on the work object to store in the Team table if the candidate was assigned by Assignment Manager.
Manual Attribute	Select a manual attribute on the work object to store in the Team table if the candidate was manually assigned.
Exclusion View Object Instance	The view object instance containing the list of excluded candidates.
Primary Key Attribute 1, Primary Key Attribute 2, Primary Key Attribute 3	The first, second, and third primary key attributes on the work object in the Team table.

Related Topics

- [Overview of Assignment Processing Components](#)
- [About Sales Resources and Opportunity Assignment](#)

How can I fix an incorrect product or product group error when converting leads?

The lead to opportunity conversion process uses the predefined Copy Lead To Opportunity Map copy map feature which is declarative way to specify which fields are copied among objects. If you receive a `M00-450064` error prompting you to enter either a product or product group for the lead you want to convert, this indicates that the Copy Lead To Opportunity Map mapping file is missing the `ProdGroupId` attribute.

Follow these steps to resolve the issue.

1. Sign in as a user with Application Composer access and verify that you've an active sandbox.
2. Access Application Composer from **Navigator > Configuration > Application Composer**.
3. From the **Advanced Setup**, select **Copy Maps**. The **Copy Maps** window appears.
4. Select the **Copy Lead To Opportunity Map**. The **Edit Copy Map** window appears.
5. In the **Entity Mappings** region, highlight the row that contains **From: Opportunity** and **To: Opportunity Revenue**.
6. In the **Attribute Mappings** region, select the **Add** icon to add a new row.
7. From the **To:** drop-down list, select **ProdGroupId** and **From:** drop-down list, select **ProdGroupId**.
8. Click **Save and Close**.

Why can't I see notifications for completed merge requests?

You receive notifications of merge requests in Error or Rejected states. But you don't receive any notifications for merge requests that were completed.

You must change the profile option value of the profile option Optimized Mode Enabled (ORA_ZCH_OPTIMIZE_LOAD) to N to receive notifications for completed merge requests.

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

Wait for a few minutes and then check if you receive notifications.

How do I opt-in to the U.S. Federal Financials option?

Enable the U.S. Federal Financials opt-in option to capture the required customer account-level and site-level attributes.

Federal government agencies are accountable for all the receivables transactions to the Department of Treasury. A federal agency could transact with another federal agency or a nonfederal agency. You must enable the U.S. Federal Financials opt-in option to capture the required customer account-level and site-level attributes. This helps in generating certain reports, such as the Bill-to-Cash activity report for the Department of Treasury.

1. Click the profile icon on the Home page and select **Setup and Maintenance** in **Administration**.
2. Select **Financials** offering from the **Setup** drop-down list.
3. Click the **Change Feature Opt In** link beside the Functional Areas heading.
4. Select **U.S. Federal Financials** feature.

Can I set the AddressType attribute from the lead to contact mapping file during lead conversion?

No. The AddressType attribute isn't available for the **Standard Copy Lead to Contact Map** predefined mapping file. This file maps objects and attributes during the creation of a contact when converting a lead to an opportunity.

Related Topics

- [How can I hide the contact address from the leads pages in classic UI?](#)
- [How do I check which copy maps are used during lead conversion?](#)

How do I enable analytics tabs for object landing pages?

The analytics on your object pages don't show by default. Administrators must enable the feature before they can add analytics to object pages. This sample procedure uses the Opportunities object landing page as an example of how to enable the analytics tab for your sales object. The steps are the same for all object landing pages.

You enable an analytics tab on an object's landing page, or on the Analytics work area itself. Here's how you specify what users see on the Navigator and in the Springboard area for your sales object.

1. Sign in as an administrator and create and enter a sandbox with the Structure tool.
2. Navigate to **Tools**, then **Structure**.
3. From Sales, click **Opportunities**.
4. From the analytics row, change the value for visible column to "Yes."
5. 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.
 - Select **Yes** in the **Show on Navigator** list.
 - Select **Yes** in the **Show on Springboard** list.
6. You can also select an icon by clicking the magnified glass icon.
7. Click **Save and Close**.

Analytics tabs are blank until you add content to them.

Tip: You can also add analytics tabs on an object's details page (edit page). To do this, use Application Composer.

What Data Security Policies are required to manage Sales Quotas for the Sales Administrator job role?

You use the **Manage Data Security Policies** task to manage the data security policies that govern grants of entitlement to a user or role on an object or attribute group. This task opens the Roles tab of the Security Console.

You can also use the **Manage Sales and Service Access** task to review and configure data security. This task opens the Sales and Service Access Management work area. For more information, see [How can I configure and troubleshoot data security for sales and service users?](#).

Quota Management Setup Granted Role

The Sales Administrator job role can manage sales territory quota setup, quota plans, prediction and spread formula parameters, and seasonality groups. The role also enables administrators to run sales territory quota synchronization and sales quota plan activation and completion processes. Other roles and duties granted to the Sales Administrator job role include:

- **Quota Export Management:** Manages bulk export of all sales territory quota related objects.
- **Quota Management Enterprise Administration:** Manages sales territory quotas and territory quota formulas. Additional duties include Incentive Compensation goal management, user and roles management, and quota management setup.
- **Upload data for Quota Import:** Allows users to upload data files to import quota-related data.
- **Territory Management Enterprise Administration:** Manages sales territories and territory proposals. Additional duties include territory management setup and quota management administration.

This table lists the Sales Quota privileges granted to duties of the Sales Administrator job role:

Privilege	Privilege Description
Manage Sales Quota Plan	Allows managing of the sales quota plan that tracks and records sales quotas for an annual sales cycle
Manage Sales Quota Prediction Formula Parameter	Allows assigning default values for territory quota formula parameters
Manage Sales Quota Seasonality Group	Allows managing of seasonality groups, which specify the factors used to split the annual quota over granular time periods
Manage Sales Quota Spread Formula	Allows managing of spread formulas used to calculate the spread ratio for distributing quotas
Set Up CRM Objects for Export	Grants the ability to register CRM objects for Export
Run CRM Export Process	Grants the ability to schedule CRM objects and export them to a file.
Configure Quota Management UI	Grants access to use Page Composer to configure task flows in Quota Management, where available
Export Sales Territory Quota	Allows managing the export of sales territory quotas and sales resource quotas.

Data Security Policies

This table lists data security policies for the Sales Quota business object and their enforcement across the analytics application for the Sales Administrator job role:

Business Object	Policy Description	Policy Store Implementation
Sales Quota Plan	A Sales Administrator can view a sales quota plan and add a member of an access group	Role: Access Groups Enablement Privilege: View Sales Quota Plan (Data)

Business Object	Policy Description	Policy Store Implementation
	associated with the sales quota plan with read access.	Resource: Sales Quota Plan
Sales Quota Plan Export Object	A Sales Administrator can view sales quota plan export objects for all sales quota plan export objects.	Role: Sales Administrator Privilege: View Sales Quota Plan Export Object (Data) Resource: Sales Quota Plan Export Object
Sales Quota Prediction Formula Export Object	A Sales Administrator can view sales quota prediction formula export objects for all sales quota prediction formula export objects.	Role: Sales Administrator Privilege: View Sales Quota PredictionFormula Export Object (Data) Resource: Sales Quota Prediction Formula Export Object
Sales Quota Prediction Formula Parameter Export Object	A Sales Administrator can view sales quota prediction formula parameter export objects for all sales quota prediction formula parameter export objects.	Role: Sales Administrator Privilege: View Sales Quota Prediction Formula Parameter Export Object (Data) Resource: Sales Quota Prediction Formula Parameter Export Object
Sales Quota Seasonality Factor Export Object	A Sales Administrator can view sales quota seasonality factor export objects for all seasonality factor export objects.	Role: Sales Administrator Privilege: View Sales Quota Seasonality Factor Export Object (Data) Resource: Sales Quota Seasonality Factor Export Object
Sales Quota Seasonality Group Export Object	A Sales Administrator can view sales quota seasonality group export objects for all seasonality group export objects.	Role: Sales Administrator Privilege: View Sales Quota Seasonality Group Export Object (Data) Resource: Sales Quota Seasonality Group Export Object
Sales Quota Spread Formula Export Object	A Sales Administrator can view sales quota spread formula export objects for all spread formula export objects.	Role: Sales Administrator Privilege: View Sales Quota Spread Formula Export Object (Data) Resource: Sales Quota Spread Formula Export Object
Sales Quota Territory Prediction Formula Export Object	A Sales Administrator can view sales quota territory prediction formula export objects for all sales quota territory prediction formula export objects.	Role: Sales Administrator Privilege: View Sales Quota Territory Prediction Formula Export Object (Data) Resource: Sales Quota Territory Prediction Formula Export Object
Sales Quota Territory Prediction Formula Parameter Export Object	A Sales Administrator can view sales quota territory prediction formula parameter export objects for all sales quota territory prediction formula parameters export objects.	Role: Sales Administrator Privilege: View Sales Quota Territory Prediction Formula Parameter Export Object (Data)

Business Object	Policy Description	Policy Store Implementation
		Resource: Sales Quota Territory Prediction Formula Parameter Export Object

How do I hide the Workspace icon from the navigator and springboard?

Workspace is enabled by default as part of your Oracle CX application configuration, and the Workspace icon is displayed in your work area. You can choose to hide or 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's how you hide the Workspace icon from the Navigator and Springboard areas:

1. Sign in as an administrator and create and enter a sandbox with the Structure tool.
2. Navigate to **Tools**, then **Structure**.
3. With the **Navigation Configuration** tab selected, you can configure what appears on the navigator and springboard. Just click the **Workspace** item to edit.
4. Select **No** in the **Show on Navigator** list.
5. Select **No** in the **Show on Springboard** list.
6. Click **Save and Close**.

Can I extend the expiration period of retired leads?

No, there isn't any expiration period placed on retired lead records for your sales application. You must first retire a lead and then manually delete the retired lead by following these steps:

1. Open the lead.
2. Enter **retire** in the Action Bar and select the **Retire** action.
3. In the Retire Lead window, select a retire reason and optional comments.
4. Click **Submit**.
5. Search for and highlight the lead, and then delete it by clicking on the 'x' icon from the Search Results page.

You can create custom Groovy scripts, custom scheduled process jobs, or routines that check for leads that were retired for a specific number of days and delete them as per your specific sales requirements.

Can I change the root user in the Sales organization hierarchy?

No, you can't. If you need to replace the root user in the Sales organization hierarchy, you must delete the hierarchy and recreate it. You can recreate it in the UI or by using Import Management or REST APIs.

See *How do I create an organization?* for more information.

Related Topics

- Which subject area can I use to create an analysis that shows the resource roles assigned to the resources within the internal resource organization hierarchy?
- How do I import organization data?
- Why can't the managers in my resource organization see information on their direct reports?
- Create Sales Users in the UI

How do I create an organization?

To create resource organizations with in Oracle Sales, you have a few options on the steps to take.

- *Create an Organization by Editing an Existing One*
- *Create an Organization from an Existing Department*
- *Create a Brand New Organization*

Create an Organization by Editing an Existing One

In this example, you're editing an existing organization to add the Sales usage to it:

1. Sign in as a setup user.
2. In Setup and Maintenance, Sales offering, search for and select the **Manage Internal Resource Organizations** task.
3. In the Manage Internal Resource Organizations page, search for and select the organization you want to change. For example, search for `vision%`.
4. In the Edit Organization page that lists usages associated with the organization, add a row to the table.
5. In the Organization Usages table, click in the empty row and select **Sales Organization** as the Usage.
6. Click **Finish**.

Create an Organization from an Existing Department

In this example, you're reusing an existing department by adding the Sales usage to it:

1. Sign in as a setup user.
2. In Setup and Maintenance, Sales offering, search for and select the **Manage Internal Resource Organizations** task.
3. In the Manage Internal Resource Organizations page, click **Create**.
4. In the Create Organization: Select Creation Method page, select the **Create from Existing Department** option.
5. Search for and select the organization.
6. Click **Next**.
7. In the Create Organization: Enter Basic Information page, click **Actions > Add Row**.
8. In the Organization Usages section of the screen, click in the empty row and select **Sales Organization** as the Usage.
9. Click **Finish**.

Create a Brand New Organization

1. Sign in as a setup user.
2. In Setup and Maintenance, Sales offering, search for the **Manage Internal Resource Organizations** task.
3. In the Manage Internal Resource Organizations page, click **Create**.
4. In the Create Organization: Select Creation Method page, select the **Create New Organization** option.
5. Click **Next**.
6. Specify the name of the new organization and select **Sales Organization** as its usage.
7. Click **Finish** to save the new organization with sales usage.

Can I create a custom validation rule for a field?

Yes, you can write a validation rule to display an error if the rule you specify isn't met.

Let's say you want the D-U-N-S number in the UI show a validation error if someone enters a D-U-N-S number that's already in the system. In Application Composer, write a validation rule to display an error if a duplicate gets entered.

See [Server Scripts](#) for more information. DUNS

Can I audit Adaptive Search and Workspace?

No, you can't see the audit history for Adaptive Search changes.

See [What fields can I audit for Sales?](#) for a list of Oracle Sales objects that you can audit.

Related Topics

- [How do I view audit reports?](#)

How do I display the record name as the title on the edit page for custom objects?

While configuring the **cx-edit** fragment in Oracle Visual Builder Studio, you can display the record name as the title in the edit page by adding 'titleItem': 'RecordName' in the resource parameter. Here's the sample code:

```
<oj-vb-fragment bridge="[[vbBridge]]" name="oracle_cx_fragmentsUI:cx-edit">
  <oj-vb-fragment-param name="resource" value="[[ { 'name': 'Payment_c', 'endpoint':
    $application.constants.serviceConnection, 'id': $page.variables.id, 'puid': $page.variables.id, 'titleItem':
    'RecordName' } ]]">
</oj-vb-fragment-param>
```

How can I configure and troubleshoot data security for sales and service users?

You can configure and troubleshoot data security for sales and service users by reviewing the information in this topic. How sales database resources are secured in your environment depends on when you were provisioned with the sales and service application.

For example:

- If you started using the sales application before release 22B, then the database resources of your enterprise are secured using data security policies, which are assigned to job roles. Data security policies specify the roles that can perform a specified action on an object and the conditions on which the action can be carried out.

Note: If you've configured one or more access groups or object sharing rules, your users receive data access through a combination of data security policies and access group rules.

- If you're using the sales application for the first time in release 22B or later, your database resources are secured using system access groups and rules. When you assign job roles to users, they're automatically assigned membership of an associated system access group, and receive all the data permissions provided by the access group object sharing rules. These rules specify the access groups that can perform a specified action on an object, and the conditions on which the action can be carried out.

The conditions specified in both data security policies and access group rules control visibility to record-level data associated with a business object, such as an opportunity. Conditions can use several components, such as team or territory access, as mechanisms for sharing data. The scope of visibility varies by object, and multiple visibility levels are supported by an object for a role.

Regardless of whether your environment was provisioned with data security policies or system access groups rules, it's recommended that you use custom access groups to supplement the data access your users receive through their job role assignments.

The following table shows your options for reviewing, configuring, and troubleshooting data security.

Work Area	What You Can Do	When to Use
Access Groups	From the Access Groups page you can configure data security by creating custom access groups, adding members to these groups, and defining rules to specify the access that group members should have.	It's recommended that you use access groups and rules to configure data security. Access groups are easy to create and manage, and are processed more efficiently than data security policies. Note: If you're using the sales application for the first time in release 22B or later, you must use access groups to configure user access to object data.
Sales and Service Access Management	From the Sales and Service Access Management work area you can review and configure the data access provided by data security policies assigned to job roles. You can also review all a user's access to object data,	Use this work area to get an overview of a user's access to data, to troubleshoot user access issues, and to review the data security policies assigned to job roles.

Work Area	What You Can Do	When to Use
	whether from data security policies or access group rules.	
Security Console	From the Security Console, you can review and configure the access provided by the data security policies assigned to a role. You can also create database resources, and define custom conditions for a resource.	It's recommended that you use access groups and rules to configure data security when possible. But you can optionally use the Security Console to define database resources and custom conditions. You can also edit data security policies when creating, copying or editing roles on the Roles tab of the Security Console.

Note: Data security changes made in any of the work areas described in the table are immediately available in all work areas.

Review the Securing Sales and Fusion Service guide on the Help Center for information about:

- How to use the Sales and Service Access Management work area to configure data security
- Managing database resources and editing data security policies on the Security Console
- Configuring access using access groups and provide sales resources with other access to sales object data.

How do I import classification data?

You can use Import Management to create, update, or delete your classification data.

You can import classification records using these steps:

1. Map your source classification data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the classification data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

How You Map Your Source Data to Target Object Attributes

You import classification data into Oracle Applications Cloud from a CSV file containing your source data that's mapped to target Oracle Applications Cloud object attributes.

You must do the following before creating the .csv file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .csv file for a successful import

If you want to import only a few records, then you can create a single CSV file for all classification attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the classification child objects. Note that you must have imported the CSV file for classification object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- **Public unique identifiers:** If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- **Source system and source system reference:** Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new classifications or are updating classifications that have source system reference data, then provide the source system and source system reference values.

Required Attributes and Validations for Classification Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Make sure that you provide valid values for these attributes so that they pass import validations inbuilt into the application.

This table lists the required attributes for classification records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Classification Record	Updating an Existing Classification Record
PartySourceSystem	The code representing the source system for the party(account, contact, household, or legal entity) to which the Classification belongs.	Identify the source system code that was used when you imported the party in a prior batch, or identify the source system code that you will use when importing the party in the same batch as this Classification.	Conditionally required Provide one of the following : • PartyId (internal ID) • PartySourceSystem and PartySourceSystemRef: system code and source system reference values) provided when	Optional

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Classification Record	Updating an Existing Classification Record
			importing the organization profile.	
PartySourceSystemReference	The reference number or text representing the source system unique ID for the party (account, contact, household, or legal entity) to which the classification belongs.	Identify the reference value from your source system that was used when you imported the party in a prior batch, or identify the source system reference that you will use when importing the party in the same batch as this classification.	Conditionally Required Provide reference information to identify the existing party. The reference information can be: - PartyId (internal ID) - PartySourceSystem and PartySourceSystemReference (source system code and source system reference values) provided when importing the organization profile. - Party Number (public unique identifier for an organization profile)	Optional
PrimaryFlag	Identifies primary classification for the parent party record.	Only one of the child records can be Primary.	Optional	Optional Pass Y to set Primary and N to reset an existing primary record.
CodeAssignmentId	The unique identifier for the customer classification assignment.	It should be a valid existing value.	Not required	Either the Code assignment Id or a combination of Source System and Source System Reference is required.
ClassCategory	The classification category name	The class category must exist. You can manage class categories from the Manage Class Categories task.	Required A value is required if creating a new classification association record.	Not Required
ClassCode	The classification code, within the classification category, assigned to the party.	The value must be a valid code for the classification category. You can only assign one code if the category definition isn't enabled for multiple code assignments to a party within the same category. The code assignment must not already exist within the same time period. You can obtain classification codes for a classification category.	Conditionally required A value is required if creating a new classification association record.	Not Required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Classification Record	Updating an Existing Classification Record
StartDateActive	The date on which the classification becomes valid.	This should be a valid date.	This defaults to the current date.	Not required
PartyId	The internal ID for the party (account, contact, household, or legal entity) to which the address belongs	Identify the party ID value by exporting the relevant Party object such as Account, Contact, and so on.	Conditionally required Provide reference information to identify the existing party. The reference information can be: - PartyId (internal ID) - PartySourceSystem and PartySourceSystemRef system code and source system reference values) provided when importing the organization profile. - Party Number (public unique identifier for an organization profile)	Not required
PartyNumber	The public unique identifier of the party record to which the classification category and classification code are associated.	The party number must exist.	Conditionally Required Provide reference information to identify the existing party. The reference information can be: - PartyId (internal ID) - PartySourceSystem and PartySourceSystemRef system code and source system reference values) provided when importing the organization profile - Party Number (public unique identifier for an organization profile)	Not required
EndDateActive	The date on which the classification code is no longer valid.	This should be a valid date.	Optional	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Classification Record	Updating an Existing Classification Record
SourceSystem	Name of external source system of the account, contact or household with which the address is associated.	The source system should exist. You can manage source systems from the Manage Source Systems task.	Optional If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.	Not required
SourceSystemReferenceValue	Specifies the identifier in the original source system	The combination of Source System and Source System Reference Value should be unique.	Optional If the source of your data is a third party or external system, and you intend to import updates to previously imported records from the same system, provide the original source system and source system reference values.	Not required

Go to **Navigator > Tools > Import Management > Import Objects**, to see all the attributes of the classification object. The page also lists attribute information like type, length, description, and so on.

Create the Source CSV File

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

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

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

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

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

Create the Import Activity

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

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Classification** from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next**.

5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

Review the Import Results

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

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

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [How You Use Alternate Keys to Import Records](#)

Can I use any third-party address verification service?

Oracle Address Verification Service(DaaS) is pre-integrated into CX Sales and can't be switched to any external services.

How do I delete master geography data?

We recommend that you raise a service request for assistance in deleting the geography data.

Before you begin, perform the following steps:

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

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

Can I change the display sequence for the enabled objects in Workspace?

No. The enabled business objects are sorted in the same sequence as the letters of the alphabet, hence are displayed in alphabetical order.

Why don't I see a custom DCL field for a standard sales object in the subject area for that object?

You must create a custom subject area to report on dynamic choice list (DCL) fields you create for standard objects in Oracle Transactional Business Intelligence (OTBI). You can then create a union analysis that joins the prebuilt subject area with your new custom subject area. Custom DCL fields don't show up in the prebuilt subject areas for standard objects.

Related Topics

- [How to Report on Custom Fields](#)
- [About Custom Subject Areas](#)

Can I create different layout versions for my business object pages in classic Oracle Sales?

Yes. You can create several different layout versions of page layouts for your classic business objects using the dynamic page layout feature in Application Composer. For example, an open opportunity can have fields that are in progress, which won't appear in a closed opportunity.

In addition to using the predefined layout pages for your Sales objects, you can create a layout version to include standard and custom fields to suit your own requirements.

See the related topics for information about how to configure page layouts for your business objects.

Related Topics

- [Overview of Dynamic Page Layouts](#)
- [Define Required, Updatable, and Hidden Properties for Fields](#)

What are Adaptive Search meta model types?

A meta model is a simplified representation of an actual model of an application, circuit, or software entity. Adaptive Search meta models are used to encode information that's necessary to index the entities that are searched from your Oracle sales application. Multiple meta models are supported with distinct workflow states, such as Archived, Active, Being Published, Sandbox, and Seeded.

When a full publish scheduled process job completes successfully, your Adaptive Search configuration becomes the latest active meta model. This ensures that users have the latest features and enhancements and aren't limited in functionality due to an older version of an active meta model being in use.

Adaptive Search Meta Model Types

Multiple meta model types can exist in an environment, but there can only be one active meta model. Adaptive Search saves the published configuration so you can restore the behavior you had before. You also have the option to restore your to the Adaptive Search configuration to the seeded meta model workflow state.

Here are the meta model types that Adaptive Search supports, each with a distinct workflow state.

- **Seeded Meta Model**
A ready to use model that's shipped to customers. You can click **Restore Defaults** to revert to the predefined meta model.
- **Sandbox Meta Model**
A modified version of the Adaptive Search configuration is stored and saved when you change the configuration and click **Save** or **Save and Close**.
- **Being Published Meta Model**
When the configuration changes are saved and you click **Publish**, the meta model is in a state of being published.
- **Active Meta Model**
When the full publish job completes successfully, it becomes the active meta model.
- **Archived Meta Model**
The previous successful version of the configuration becomes the archived meta model. There's only one archived version available.

Meta Model Maintenance

From the **Configure Adaptive Search** page, you can click the **Monitor** tab and select **Maintenance** to run a scheduled process which:

- Backs up the current active meta model
- Removes older snapshots
- Cleans up any search server index or snapshots that aren't associated with any workflow state of the meta model.

Oracle recommends that you schedule the **Maintenance** job to run daily.

You can restore the current active Adaptive Search configuration by clicking **Restore from Backup**. This action clears any saved changes that aren't yet published.

Note: **Restore from Backup** is disabled if a meta model is being published.

To restore the last active Adaptive Search configuration version, click **Revert to Previous Version**.

Any other actions should be taken by your help desk.

Related Topics

- [How do I monitor Adaptive Search background processes?](#)

How do I generate a configuration report to view table and column details for my customization?

Use the Configuration Report to view a detailed list of Application Composer changes made by administrators in your environment. You can retrieve details such as the **Table Name**, which indicates what table the custom object or field belongs to. You can also identify the fields or objects in that table using the **Column Name** attribute.

Generate the **Configuration Report** as follows:

1. Confirm that you're not in a sandbox session.
2. Navigate to **Application Composer > Common Setup > Metadata Manager**
3. Click **Generate**.
4. In the Generate Configuration Report dialog, indicate the items that you want to include in the Configuration report.
5. Click **Generate**.
6. Download the report in HTML, in Microsoft Excel (.xls) format, or in Microsoft Excel Worksheet (.xlsx) format.

Use the Configuration Report to view the details of a custom object. Simply click the name of the custom object in the report. You can generate the report as many times as needed, each time overwriting the previously generated version of the report.

For more information see [How to View Application Composer Changes](#).

How do I map an Oracle HCM job to a role?

You map an Oracle HCM job to a role using the Manage Resource Roles task.

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

A job-to-role mapping associates an HCM job with a specific resource role.

Note: Only one resource role can be added based on the HCM job-to-role mapping.

This mapping simplifies the task of assigning resource roles to new employees or contingent workers, resulting in time and cost efficiency.

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

Here's how to map HCM jobs and roles:

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

Related Topics

- [Jobs](#)

How can I update a resource role?

To update users' resource roles, use Import Management or REST APIs.

See [Examples of Making Resource Role Related Updates](#) and the [REST API for CX Sales and Fusion Service](#) guide for more information.

Related Topics

- [How do I change user resource roles when job assignments change?](#)
- [How can I see all resource roles assigned to users?](#)

Why can't my users see products in Oracle Sales in the Redwood User Experience?

If your users can't see products in Oracle Sales in the Redwood User Experience, but they can see them in classic Oracle Sales, check that their user role has the required privilege, View User Context.

The View User Context privilege is supplied in several of the supplied user roles for Oracle Sales, including the Sales Representative, Inside Sales Representative, and Sales Manager user roles. However, if you've created custom roles, the privileges might not have been included in your custom roles.

Related Topics

- [User and Role Access Audit Report](#)
- [Review Role Assignments](#)
- [Edit Job Role and Abstract Role](#)
- [User Role Membership Report](#)

How do I create custom match rules?

You can use the custom match rule and scoring functionality to create your own match rules and scores based on your business requirements.

Use the following procedure to create custom match rules.

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Customer Data Management
 - Functional Area: Data Quality Foundation
 - Task: Manage Enterprise Data Quality Matching Configurations
2. On the Manage Enterprise Data Quality Matching Configurations page, drill down on the predefined or the user-defined matching configuration for which you want to create or update predefined rules.
3. Click **Manage Match Rules** on the Edit Match configuration page.
4. On the Manage Match Rules page click New. Alternatively, you can click Duplicate to create a new rule based on an existing predefined or user-defined match rule.
5. Enter the following values for the newly created or copied match rule:
 - **Rule Name:** The name of the new rule. There's no restriction for the rule name.
 - **Match Rule Score:** The score that you assign to the rule. The value must be between 1 and 100.
 - **Rule Attribute:** The standard or predefined attributes that must be used in the custom match rules. Specify an attribute name followed by either Exact or Fuzzy to find exact matches or closer to the attribute value matches. You can specify any number of rules separated by commas but you must ensure that the rule is logical. Ensure that the syntax and spelling are exact. The following are examples:
 - `name:Exact,address:Exact,taxnumber:Exact`

- `name:Exact,address:Fuzzy,taxnumber:Exact`

Note: Address:Exact match returns a match when all three of the following match:

- Address lines 1, 2, 3 and 4, postal code
- Country
- State or City

City need not match exactly but the address is considered an exact match if the address lines fields, state, and country match.

6. Click **Save** or **Save and Close**.

How can I view translated text for lookups and other translation-enabled fields?

For custom fields that specifically use lookup types or other translation enabled fields, such as Sales Method and Sales Stage for the Opportunity business object, you can use the following high-level steps to view translations for your custom records.

Note: To translate other custom object labels and field labels, you can use the string editor **User Interface Text** as an option. The following steps don't apply to field types, such as Dynamic Choice List (DCL), Text, or Long Text.

1. Sign in as an administrator to your sales application using the default language preference such as American English.
2. While in a sandbox, create a custom field or custom data value using Application Composer.
3. Publish the sandbox.
4. Sign out and sign in again by selecting the translation preference language you want, such as Spanish, from the **Select Language** drop-down list.
5. Navigate to the area or page where your custom text is displayed and then edit the record.

Note: The custom data will be displayed in the American English source language.

6. Edit the custom record and click **Save**.

Saving the custom record translates only the custom data to Spanish and doesn't change the source language for other text values on the record. You can verify this by doing the following:

- o Sign in again to your sales application.
- o Change your language preference back to American English
- o Edit the custom record again, and the custom values will display in the original English language.

Note: You can use the User Interface Text application to translate custom smart action display labels. If the custom smart action cache of the label isn't automatically refreshed after publishing the sandbox, you might need to manually refresh the cache.

Related Topics

- [What's the difference between Language and Source Language?](#)
- [Modify Text Using User Interface Text Tool](#)

Why can't I see my Sales Orchestration Guidance panel?

The Guidance panel gets displayed only if there's an active orchestration running on the specific records that you're viewing. You must associate the orchestrations you want to test or activate to existing records by running the **Associate Orchestrations** scheduled process.

Note: The **Associate Orchestrations** scheduled process is required only to associate existing records. New records are automatically associated with the appropriate active orchestration.

You can set up the process to run periodically as described in [Associate Records to Orchestrations](#).

How can I create a visualization of opportunities by sales stage when I have multiple sales methods?

To create visualizations by opportunity sales stage for multiple sales methods, you must include Sales Method as a filter in both your Oracle Transactional Business Intelligence (OTBI) analysis and in the visualization you create from that analysis.

Opportunity sales methods can share sales stages, so you can't create a visualization by sales stages alone if you have multiple sales methods. When you add Sales Method as a filter in the visualization, users get to select the sales method they want to view in the visualization. The visualization then displays the opportunities by sales stage for that selected sales method.

How do I manage group information in Customer Data Management

You can use the Group entity to create a customer record consisting of a collection of persons and organizations, and have a business relationship with other entities. You can assign a group to opportunities and leads.

A group includes basic information such as name, type, and certification level, and child entities such as group members, relationships, classifications, and contact methods. The group type such as Couple, Household, or Joint Ownership classifies a group based on its purpose. The Groups work area provides you separate tabs to manage different types of group information, such as profile, usage assignments, relationships, source system references, and linked parties.

Group Members

A group member can be a person or an organization, and their member type attribute defines the relationship of the member with the group. For example, a member of type Group Contact is the contact for the group. You can manage members of a group from the Profile tab of the Group work area.

Create Groups

To create groups:

1. Navigate to the **Groups** work area as follows: **Navigator** > **Customer Data Management** > **Groups**.
2. Click the **Create** action menu option or button.
3. Complete the mandatory fields. Enter the following sample data:
 - o Name: John and Family
 - o Usage: Party of Interest
 - o Type: Household
4. Click **Save and Close** or **Save and Edit**, as required.

Edit Groups

To edit groups:

1. Navigate to the **Groups** work area as follows: **Navigator** > **Customer Data Management** > **Groups**.
2. Search for the group that you want to edit. You can search by entering criteria such as the group name, registry ID, and type. You can also use the saved searches.
3. Select the group you want to edit from the Search Results region and click through its identifier to navigate to the **Edit Group** page.
4. On the **Edit Group** page, you can add new group members as well as edit group details such as usage assignments, relationships, source system references, classifications, and linked records.
5. Click **Save and Close**.

How do I troubleshoot user access issues?

Troubleshoot data access issues for users using the access explorer.

On the Explore page, you can view all the access group rules and data security policies that affect a user's ability to view an object record and see whether or not each rule or policy has been granted to the user. You can use this information to find answers to questions such as these:

- What access policy do I have to grant to give the user access to a specific record?
- Which granted rule do I have to remove from the user so that the user can no longer access a record?

Note: The Explore UI shows the data access users receive through the Oracle CX roles they're assigned. It doesn't show users access to object records provided by non-CX roles, such as Oracle HCM roles, that they might also be provisioned with.

To discover why there are issues with a user's access to a specific object record, you need to know:

- The user name of the user.
- The name of the object.
- The Public Unique Identifier (PUID) of the record.

For information on how to find the PUID of a record, see the topic [Display Public Unique Identifiers for Object Records](#).

Note: Some objects don't support PUIDs. You can't investigate a user's access to a specific record for these objects.

Use these steps to review all the rules and policies that affect a user's access to a specific object record.

1. On the Sales and Service Access Management page, click **Explore Access**.
2. On the Explore page, select the name of a user in the **User Name** field.
3. Select an object in the **Object** field.
4. Enter the PUID of the relevant record in the **Public Unique Identifier** field.

The **Public Unique Identifier** field is unavailable if the object doesn't support public unique identifiers.

5. Click the **Explore** button.

By default, all the rules and data security policies defined for the object that grant access to the record are listed in the Access Groups table and the Data Security Policies table respectively. Review the information in the **Status** column of each table to see which of these rules and policies the user is granted.

Tip: You can display additional data for each rule or policy by selecting options from the **View** menu of each table.

6. Select the information you're interested in viewing in each table.

You can display different views of the user's access to the object record by changing the selections in the filters available for each table.

For example, if a user can't access the record, it might be because the user isn't granted access to the record, or because the user is granted access but the relevant rule or policy is inactive, or because the relevant data security policy is future dated. Select these filter options to figure out the cause of the issue.

Rules or Policies to View	Filter Options to Select
All the rules or policies that provide record access that the user isn't assigned	◦ Not granted option from the Show Access list (Access Groups table) or the Show Conditions list (Data Security Policies table) ◦ Yes option from the Provides Record Access list
All the inactive rules or policies assigned to the user that provide record access	◦ Granted and inactive option from the Show Access list or the Show Conditions list ◦ Yes option from the Provides Record Access list
All the future dated policies assigned to the user that provide record access	◦ Granted and future dated option from the Show Conditions list ◦ Yes option from the Provides Record Access list

7. In the Access Groups table, you can review the following information for each rule.

Field	Description
Status	This field can have one of these values: ○ Active. The rule is granted to the user, the rule is active, and the rule is enabled for an active access group. ○ Inactive. The rule is granted to the user but the rule is inactive, the access group the rule is associated with is inactive, or the rule to group association is disabled. ○ Not granted. The user isn't granted the rule.
Provides Record Access	This field indicates if a rule grants access to the record specified in the Public Unique Identifier field. A check mark indicates that the rule provides record access; if the field is empty, the rule doesn't provide access to the record. In the Access Groups table, this field can also be set to Not Applicable. This value is displayed for inactive custom rules. You must activate custom rules to see whether or not they provide record access.
Rule Name and Group Name	For rules that are granted to the user, these fields show the name of the rule and the name of the access group through which the user is assigned the rule. For rules that aren't granted to the user, only the rule name is shown. Tip: You can click the Rule Name or Group Name fields to drill down to the edit rule or edit group pages on the Access Groups UI if you have the Manage Group Access privilege (ZCA_MANAGE_GROUP_ACCESS_PRIV). This is useful if, for example, you want to investigate why a rule is inactive, or if you want to change the activation status of a rule. See the Access Groups chapter for information about editing access groups and rules.
Permissions	For rules that are granted to the user, you can review the type of access provided by the rule.

8. In the Data Security Policies table, you can review the following information for each policy.

Field	Description
Status	This field can have one of these values: ○ Active. The policy is active and is granted to the user. ○ Inactive. The policy is granted to the user but is inactive. ○ Future dated. The policy is granted to the user but the policy Start Date is set to a date in the future so the policy isn't yet active. ○ Not granted. The user isn't granted the policy.

Field	Description
Provides Record Access	This field indicates if a policy grants access to the record specified in the Public Unique Identifier field. A check mark indicates that the rule provides record access; if the field is empty, the rule doesn't provide access to the record.
Role	The name of the role or roles that provide the policy. The role name is displayed only for policies that are granted to the user.
Permissions	For policies that are granted to the user, you can review the type of access provided by the policy.

You can use the information from the **Status** and **Provides Record Access** fields to figure out what you have to do to provide a user with record access or to remove record access. But you can't edit data security policies on the Explore page.

For example, you might find that a policy that provides a sales manager with access to their subordinates opportunity records is future dated. In this case, note the name of the role providing the policy and edit the role on the Manage Data Policies page or on the Security Console to change the **Start Date** of the policy to the current date.

What objects and channels are available in Sales Assistant?

Oracle Sales Assistant is a skill that can help you carry out day-to-day sales-related CRM tasks in Oracle CX Sales. Sales Assistant supports Accounts, Appointment, Contacts, Opportunities, Service Requests, Tasks, Sales Leads, and Custom objects. The supported channels are Microsoft Teams and CX Sales Mobile and your administrator can enable or disable different objects for each channel.

To enable Oracle Sales Assistant for your users, apply for access on the [Sales Assistant Forum](#) on Oracle Cloud Customer Connect.

How do I import hierarchy member data?

You can use the import functionality to create or update Hierarchy Member records.

To import Hierarchy Member records, perform the following tasks:

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

How You Map Your Source Data to Target Object Attributes

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .CSV file for a successful import.

Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

Select a Unique Identifier for Your Records

To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.

The preferred option to uniquely identify an object record is through the Public unique identifiers. If you're creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with 'Number' and usually visible in the business object's UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Hierarchy Member object, the attributes are:

- TreeStructureCode
- TreeCode
- PartyNumber
- ParentPartyNumber
- AsOfDate

Required Attributes and Validations for Hierarchy Member Object

To import data successfully into Oracle Applications Cloud, your .CSV file must include the required attributes. Ensure that you provide valid values for the attributes.

The following table lists the required attributes for importing new Hierarchy Member records, required attributes for updating Hierarchy Member records, prerequisite setup tasks for the attributes, and specific validations, if any, for Hierarchy Member import:

Attribute	Description	Data Type	Data Length	Prerequisite Setup Task/ Import Validations	Creating a Hierarchy Member Record	Updating an Existing Hierarchy Member Record
TreeStructureCode	Unique identifier for a tree structure.	Varchar2	30	Seeded data needs to be present.	Required	Required
TreeCode	User defined identifier for the tree code.	Varchar2	30	No validation	Required	Required
PartySourceSystem	Original System Id for the party.			An account needs to exist.	Required	Required
PartySourceSystem	Original System Reference for the party.			An account needs to exist.	Required	Optional
PartyId	Unique Id for the Party.	Number	18	An account needs to exist.	Required	Required
ParentPartyId	Unique Id for the Parent Party.	Number	18	An account needs to exist.	Required	Required
ParentPartySourceS	Original System Id for the parent party.	Varchar2	30	An account needs to exist.	Required	Optional
ParentPartySourceS	Original System Id for the parent party.	Varchar2	240	An account needs to exist.	Required	Optional
LabelShortName	Label Name based on the position in the tree hierarchy with respect to the child.	Varchar2	80	Seeded data has to exist.	Required	Optional
PartyNumber	Unique identification number for this party.	Varchar2	30	An account needs to exist.	Required	Optional
ParentPartyNumber	Unique identification number for this parent party.	Varchar2	30	An account needs to exist.	Required	Optional

You can view the Hierarchy Member object along with all its child objects and attributes in the **Manage Import Objects** page of the **Import Management** flow. You can find attribute information like type, length, description, and so on, on this page.

Create the Source CSV File

The .CSV file is provided as input to the file-based data import process. You must populate the .CSV file with the data you want to import into Oracle Applications Cloud.

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

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

You must edit the template CSV file and provide valid values for the required attributes. You can attach different types of files, giving each file a specific description.

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

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

Create the Import Activity

To import data into Oracle Applications Cloud, you need to create an import activity and provide the CSV file as an input to the activity.

To create an import activity, do the following:

1. In the Navigator, under **Tools**, click **Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. In the **Create Import Activity: Enter Import Options** page, provide a name for the import activity, and select **Hierarchy Member** from the **Object** drop-down list.
4. In **File Name**, browse and upload the required .CSV file, and click **Next**.
5. In the **Create Import Activity: Map Fields** page edit the attribute mappings if required, and click **Next**.

Note: Click **Validate Data** to validate the mapping of the source file for unmapped columns and to check for data format issues.

6. In the **Create Import Activity: Review and Submit** page, click **Submit**.

Note: Initiate the Tree Flattening Service manually. Do one of the following:

- From the navigator, select **Scheduled Processes**. In the Schedule New Process dialog, search for **Party Hierarchy Generation** and click **OK**.
- From Setup and Maintenance, search and run the Trading Community Party Hierarchy Generation task.

Review the Import Results

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

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.

3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)

What deep link URL patterns do I use to navigate in Workspace?

Deep links are links that point to another page. You can embed default Workspace deep link URL patterns for the supported and custom objects to any web page as a link. By clicking deep links, your sales and service users can go directly to the details of the corresponding record within the context of Workspace.

For example, here's an example of the standard deep link URL pattern for the Account business object in your Workspace:

```
https://<hostname>:<port>/crmUI/faces/FuseOverview?fndGlobalItemId=
itemNode_workspace_workspace&fndTaskItemId=ZCA_CC_INTERACTIVE_UI_CRM&fnd=%3B
entityName%253DAccount%253BsubTabName%253DOverview%253BrecordId%253D<RecordID>%253B%3B%3Bfalse%3B256%3B
%3B%3B
```

Tip: Copy the first part of the URL, `https://<hostname>:<port>/`, from your instance's actual home page.

Sometimes, an other parameter, `subTabName`, is also included in the URL. For example, this sample URL syntax allows direct links to the specified subtab:

```
http://<hostname>:<port>/crmUI/faces/FuseOverview?fndGlobalItemId=
itemNode_workspace_workspace&fndTaskItemId=ZCA_CC_INTERACTIVE_UI_CRM&fnd=%3B
entityName%253D<EntityName>%253BsubTabName%253D<SubTabName>%253BrecordId%253D<RecordID>%253B%3B%3Bfalse
%3B256%3B%3B%3B
```

If you want the selected record to open in inline mode, just add `&action=EDIT_INLINE` to the end of the URL. For example, this sample syntax open your record ID in inline mode:

```
http://<hostname>:<port>/crmUI/faces/FuseOverview?fndGlobalItemId=
itemNode_workspace_workspace&fndTaskItemId=ZCA_CC_INTERACTIVE_UI_CRM&fnd=%3B
entityName%253D<EntityName>%253BsubTabName%253D<SubTabName>%253BrecordId%253D<RecordID>%253B%3B%3Bfalse
%3B256%3B%3B%3B&action=EDIT_INLINE
```

Note: If you don't specify `&action=EDIT_INLINE`, records open in inline mode by default.

You can also configure deep links to open selected records in dynamic and nested tabs by adding `&action=EDIT_IN_TAB` to the end of the URL. For example, this sample syntax opens your record ID for edit in a dynamic tab:

```
http://<hostname>:<port>/crmUI/faces/FuseOverview?fndGlobalItemId=
itemNode_workspace_workspace&fndTaskItemId=ZCA_CC_INTERACTIVE_UI_CRM&fnd=%3B
entityName%253D<EntityName>%253BsubTabName%253D<SubTabName>%253BrecordId%253D<RecordID>%253B%3B%3Bfalse
%3B256%3B%3B%3B&action=EDIT_IN_TAB
```

In the above sample syntax, you must replace the <RecordID> with the actual value from your environment. To get this value, use the this sample SQL syntax to retrieve a record ID for a service request that has an SR Number value of SR0000000002.

```
select sr_id from fusion.svc_service_requests where sr_number = 'SR0000000002'
```

Note: For deep links to Workspace saved searches, the <Saved_Search_UUID> should belong to the same entity as the <RecordID>.

For example,

```
https://<hostname>:<port>/fscmUI/faces/deeplink?objType=ZCA_WORKSPACE_REQUEST&objKey=savedSearchUuid%3D<Saved_Search_UUID>%3D<EntityName>%3D<EntityName>%3DRecordId%3D<RecordId>%3DSubTabName%3D<SubTabName>&action=EDIT_INLINE
```

A URL example to a default action to a Workspace List page is as follows:

```
https://<hostname>:<port>/fscmUI/faces/deeplink?objType=ZCA_WORKSPACE_REQUEST&action=NONE
```

Here's an example deep link URL to a default action for a saved search List page:

```
https://<hostname>:<port>/fscmUI/faces/deeplink?objType=ZCA_WORKSPACE_REQUEST&objKey=savedSearchUuid%3D<Saved_Search_UUID>&action=NONE
```

How do I remove an extra Comments field from displaying in Advanced Search for my Opportunity?

If you've added a custom Comments searchable field via Application Composer to an opportunity, then two Comments fields get displayed on the Advanced Search page when you try searching for your opportunities. This happens because the ready to use Opportunity Contacts object comments field has the **Searchable** checkbox already enabled.

The searchable checkbox, if enabled, indicate if you want this field to be made available for selection as an additional search criterion from the Add Fields choice list in the Advanced Search mode.

If you decide that you want only your custom **Comments** field to display for your opportunity, then you can remove the extra predefined comments field from displaying in the Advanced Search page by deselecting the **Searchable** checkbox as follows:

1. Navigate to Application Composer from the Configuration category in the Navigator.
2. Expand the **Opportunity > Opportunity / Contact** object.
3. Click **Fields** and then click the **Standard** tab.
4. Edit the **Comments** field and in the **Constraints** section deselect the **Searchable** checkbox.
5. Click **Save and Close**.

Are addresses audited after batch cleansing?

Batch address cleansing updates multiple addresses at a time. These updates don't trigger audits or groovy codes.

What is the maximum supported depth for tree structures?

The maximum supported depth for tree structures is 10. This can be set in the Manage Tree Structure task.

Do I need a separate license to work with Customer Data Management?

Customer Data Management is shipped free of cost with some Oracle Cloud Services such as Oracle CX.

An Oracle CX license provides you access to the following customer data management functionality:

- Data Steward Productivity Tools
- Reporting and Analytics
- Audit Reporting
- Customer Hub
- Customer Hierarchy Management

To make use of Data Quality, Data Enrichment, and Address, Email, and Phone Verification capabilities, you require the following additional licenses:

- Oracle Fusion Data Quality Cloud Service: This service enables you to identify and resolve potential duplicates records in the database or potential duplicates of the records in the database within an import batch. You can use this service for both real-time and batch duplicate identification.
- Oracle Address, Email, and Phone Verification: This service enables you to cleanse and verify addresses.
- Oracle Account Enrichment Cloud Service and Oracle Contact Enrichment Cloud Service: These licenses enable you to enrich company and contact data.

How do I disable alternative names in addresses?

Use the Hide Alternate Address Names (HZ_ADDRESS_DISABLE_ALT_NAMES) profile option to disable alternative names in addresses.

To disable this profile option:

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance** work area.
2. Click the Tasks menu and click Search. Search for Manage Administrator Profile Values task and open it.
3. Search HZ_ADDRESS_DISABLE_ALT_NAMES using the profile option code.
4. Select No.

How do I delete or truncate interface tables?

Use the Delete or Truncate Interface Tables scheduled process to clean up the interface tables to improve the import performance. These import interface tables are for Account, Contact, and Household import.

When to Use

This scheduled process is used to delete or truncate the interface tables, after a file-based import job is completed and the data is moved to the base tables from the interface tables.

Privileges Required

Verify that you have the following privilege or role:

- Master Data Management Application Administrator

Before You Start

Review the following before scheduling this scheduled process:

- Recommended Frequency:
 - You can run this scheduled process based upon your need. This is to remove data from HZ interface tables. If import is used to load high volume data, you can use this scheduled process to clean the data from interface table at regular intervals.
- Compatibility:
 - This scheduled process is self-incompatible. If multiple instances are submitted, the first instance runs and subsequent instances remain in blocked status until the first instance is completed.

Parameters

You might need to specify some of the following parameters:

Parameter	Optional or Mandatory	Description	Parameter Values	Special Combinations Required	Notes
Action Code	Mandatory	Action to be performed in interface or table.	Any	No	N/A
Truncate Interface	Optional	Truncate interface.	Any	No	Truncates Interface tables

Note: If there are no values passed this process exits and doesn't delete any tables. This scheduled process doesn't process any data when an active import is in progress.

Troubleshooting Information

Use this information to troubleshoot the scheduled process.

- Check the log or output file.
- If the scheduled process didn't run successfully, you can re-submit the process after rectifying the error.
- This scheduled process is idempotent, which means, this scheduled process can be restarted if it failed in the initial run. No cleanup is required.
- To verify that this scheduled process ran successfully from the application (and not from logs or pages), you can use the count of data deleted or truncated from interface table.

How to find the parent ID of a scheduled process?

The parent ID of a scheduled process can be found on the Process Details tab of a scheduled process.

1. Click **Navigator > Tools > Scheduled Processes**.

A list of currently running scheduled processes are displayed.

2. Click the required process.

The parent ID is displayed on the Process Details tab.

How do identify duplicates using key generation?

The EDQ matching process for real-time and batch matching makes use of the EDQ Cluster Key Generation service and the EDQ matching service for duplicate identification. Successful key generation is critical to duplicate identification.

Key generation identifies similar parties and assigns a key to each. When a matching configuration is made active, the application passes a set of keys (subset of parties) to the EDQ matching service to process for duplicate identification.

The EDQ Cluster Key Generation service must be run whenever a record is added or updated in the application. This service generates keys for records added as well as for the records that are updated in the application. If keys aren't generated, duplicate identification fails.

How You Configure Key Generation

The duplicate identification process uses matching keys, which must be maintained through a key generation process. You need to set up a recurring, incremental key generation job for each active data quality matching configuration for batch duplicate identification. You also may want to configure real-time key generation for immediate matching of new data as soon as new data is entered.

How You Setup Recurring Incremental Key Generation (Required)

You can schedule incremental key generation for an active matching configuration using the schedule key generation option on the Edit Matching Configuration page. This generates keys for records that don't have a key or if the key time

stamp is older than that of the records. You must incrementally generate matching key values for the new or updated accounts and contacts.

To assure your duplicate identification processes use up-to-date matching keys, check if the following setup tasks have been completed.

1. In the Setup and Maintenance work area, go to the following:
 - Offering: Customer Data Management
 - Functional Area: Data Quality Foundation
 - Task: Enterprise Data Quality Matching Configuration
2. Click the name of the required active match configuration.
3. Click Scheduled Key Generation.
4. Click Advanced.
5. Select Using a schedule option in the Advanced Options section.
6. Specify the frequency, the start date, and end date to run the scheduled process.
You may want to select a distant end-date to reduce how often you must run this task and to help assure that the recurring schedule doesn't lapse.
7. Click Submit.
The recurring incremental key generation scheduled process is submitted.

How You Specify Real-time Key Generation (Optional)

You may want to configure keys to be generated for immediate matching of new data as soon as new data is entered. For example, different users may be entering duplicate records at nearly the same time and you may want the keys to be generated immediately. Real-Time key generation process is available to handle such scenarios.

Follow these steps to enable real-time key generation:

1. Search and navigate to the Manage Administrator Profile Values task.
2. Search for the ORA_ZCQ_ENABLE_REALTIME_KEYGEN profile option.
3. Set the Site level profile option value to Yes.
4. Click Save and Close.

Best Practices for Real-Time Key generation

Here are guidelines to help you decide if real-time key generation is right for your business needs:

- Use Real-Time key generation only if an appropriately scheduled incremental key generation process doesn't support your business process needs.
- Certain processes, such as batch address cleansing, don't trigger real-time key generation events. Real-time key generation isn't sufficient to replace recurring incremental key generation, but it may be used as a complement for certain business scenarios.
- If possible, disable update events for higher-volume data creation and update processes, such as web service-based data integration flows.

To disable high-volume user accounts from generating update events:

1. Search and navigate to the Manage Administrator Profile Values task.
2. Search for the ZCA_PUBLIC_BUSINESS_EVENTS profile option.
3. Click **Actions** > **New** in the Profile Values section.

4. Specify the following values:
 - Set the Profile Level to User.
 - Select the User Name for which you want to suppress business events.
 - Set the Profile Value to No.
5. Click Save and Close.

How You Rebuild Keys

You must rebuild keys before activating a new configuration. You must rebuild keys if you change match configuration mappings or if you think that the keys are no longer valid because of updates to the records. You can regenerate matching key values using the Rebuild Keys option in the Edit Matching Configuration page.

How You Specify Real-time and Batch Key Generation Options

You can specify different key generation options for batch matching and real-time matching. Take for example the cluster key level parameter that has the values, limited, typical, or exhaustive. It's possible to select one value of this parameter, say limited, for batch matching and another, say exhaustive, for real-time matching, depending on how tightly you want the data quality engine to match records.

How You Review Key Generations Status

You can search for key generation jobs and review the status of each key generation job on the Manage Key Generation page. The following table describes the various possible key generation statuses for a matching configuration.

Key Generation Status	Description
Pending	Key generation for the configuration is required.
Processing	Key generation for the configuration is in progress.
Review Required	Key generation for this configuration needs review.
Ready	Key generation for this configuration is complete.

How do I display the Sales Insights section for custom layouts?

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

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. See [How do I enable Sales Insights?](#) for more information.

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.

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.

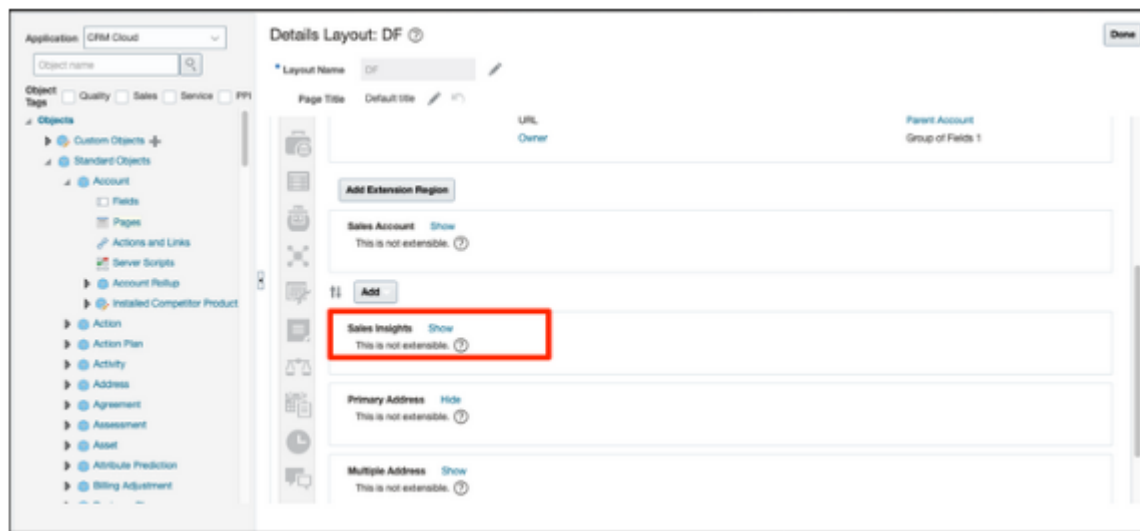
If none exists, then duplicate the standard layout using the duplicate layout icon, and edit the resulting layout.

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.

How do I enable Sales Insights?

Sales Insights data is mined, evaluated, and analyzed through data analytical and statistical modules. Based on detailed analysis of interactions and historical exchanges, salespeople can gain key insights and take appropriate corrective actions on records to further increase their sales pipeline.

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 as follows:

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).

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 *How do I display the Sales Insights section for custom layouts?* for more details.

Next, you must schedule Sales Insights data processes. For instructions about how to schedule the jobs, see *Submit Scheduled Processes and Process Sets*.

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**.

How can I hide certain objects from a partner?

As a sales administrator, you can hide objects from a partner by editing the partner's functional privileges.

For instructions on removing existing functional security privileges, see [How do I edit job or abstract roles?](#).

Can I update partner status from inactive to active?

No, you can't change partner status from inactive to active in Oracle Sales PRM yet. The transition from a custom status to prospective or registered isn't feasible currently for partners.

How do I configure approval work flow for deal registration?

You can set up the approval work flow for deal registration based on the deal value in Oracle Sales PRM by following these steps:

1. Navigate to **Worklist** as the sales administrator.

2. Search for DealsApprovalTask and click **Edit**.

A Warning message box appears.

3. From the **Warning** message box, click **Start Synchronization**.

Wait for the synchronization to complete.

4. Click **Save and Commit**.
5. Click **Edit** to edit the task again.
6. Select a stage that you want to edit and then, select the participant.
7. As this is a rule-based approval, you can either reuse the existing rule set or create a new rule set. To create a new rule set click **Create Rule**.
8. In the rule set, you can add new rules or change existing rules as per your requirements.
9. Once the rule is created, click the add icon and select **simple test**.
10. In the **Condition Browser**, select the custom attribute which you're using to assign approvers.
11. Add the appropriate condition.
12. You can add the approvers for when the condition is met. To add an approver click the add icon and select **Add Approver**.

You can add approval group, user-based approvers, role-based approvers.

13. Click **Save and Commit**.

You can now test the flow to verify.

How do I check for duplicate partners?

In Oracle Sales PRM, you can check for duplicate partners while creating a new partner.

Ensure that the profile option **ZCM_ACC_DUP_NOTIFICATION** is set to True to enable checking for duplicate records. For instructions, see [Enable Checking of Duplicate Records](#).

Here are the steps that you can follow to check duplicate partner records:

1. Navigate to **Redwood Sales > Partners**.
2. Click **Create Partner**.

The Create Partner dialog box appears.

3. Add details to the relevant fields, and click **Create**.

A message appears in the **Create Partner** dialog box if any similar partners exist in the record.

Enable Checking of Duplicate Records

You can follow these steps to enable checking of duplicate records:

1. Go to **Settings and Actions > Setup and Maintenance > Setup > Sales**.
2. In **Functional Areas**, select **Sales Foundation > Manage Administrator Profile Values** task.
3. In **Profile Option Code** enter ZCM_ACC_DUP_NOTIFICATION, and click **Search**.
4. If the profile option isn't set to TRUE, set it to TRUE.

Can I use quotes and orders without integrating with Oracle CPQ?

No, you can't. Oracle Sales depends on the Oracle CPQ integration for quoting and ordering functionality.

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. Also, 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.

See the *Integrating CX Sales with Oracle CPQ* guide for more information.

How do I customize the global header?

The global header is the uppermost region in the UI, and it's available on all pages. It's where you find, for example, the Navigator. You can change the global header and add your own banner to the header.

See *Set a Banner Message in the Global Header* for more details.

Can I show a page to just one user?

Yes, you can. Set up the page layout and tie it to a specific, custom user role.

See *Control a Page Display Based on a User's Role* for more information.

How can I see more emails when sharing objects with the Outlook add-in?

To see a longer list of email addresses when sharing an email, use advanced sharing mode in the Microsoft Outlook add-in. Note this functionality only applies to the previous version of the add-in, Microsoft 365 for Sales.

Note: 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. For more information about the latest version of the add-in, start with the [How do I implement Microsoft 365 for Oracle Sales Redwood UX?](#) playbook on [Oracle Help Center > Sales > Playbooks page](#).

Enable Advanced Sharing Mode

Here's how to enable Advanced Sharing in the previous version of the add-in:

1. Enter a sandbox and open Microsoft 365 Designer by going to **Application Composer > Productivity Applications Setup > CX Cloud Microsoft 365**.
2. Expand the side panel and go to **Related Records**.
3. Create a new layout and name it in a way that it indicates it's being used for 'Advanced Sharing'.
4. **Save** the layout.
5. Re-open the layout you just added.
6. In the layout details section, turn on **Advanced Sharing Mode**.
7. Save the layout.
8. Test your new layout and publish the sandbox.

Can I delete lookup codes from a custom choice list?

Yes, you can. Even disabled lookup codes in a custom choice list can remain visible in some modules, such as Workspace. However, if you delete them instead of disabling them, they won't appear anywhere.

See [Overview of Lookups](#) for more information.

How do I add products to an opportunity in Sales in the Redwood User Experience?

You can add products or product categories to an opportunity in several ways. You can either browse the product catalog and search for your product or if you know the exact name of the product you want to add, then you can quickly add the product from the Add Products panel.

Add Products from the Panel

Here's how to quickly add products or product categories to an opportunity from the **Add Products** panel.

1. Open the opportunity you want to update.
2. In the Action Bar, enter **add** and select **Add Products**.
3. From the **Add Products** panel, enter the product details.
4. Click **Add More** to add more products and when you're done adding and editing the items, click **Save**.

Add Products Using Browse Catalog

Here's how to add products or product categories to an opportunity by browsing the catalog.

1. Open the opportunity you want to update.
2. In the Action Bar, enter **browse** and select **Browse Catalog**.
3. You can add multiple products or product categories to the opportunity in one of two ways:
 - You can browse the Product Catalog by clicking on product category names. As you browse, you can add multiple items to the lead or opportunity by clicking the plus (+) icon. You can also select from the list of recent items displayed at the end of the page.

Note: Depending upon how the application is configured, your default view of the products list might be filtered to show only the products or product groups in your assigned territories. If so, you can click the **x** on the Filter by Territory filter to show all products and product groups in the catalog.

- If you know the name or part of the name of the product or category, enter it in the Action Bar and press the **Return** key to display product categories and products with that name or part of that name. You can add multiple such filters. And you can start browsing through your search results at any time.

Note: Ensure that your administrator has enabled the Product and Product Group objects for Adaptive Search and has run a full publish process. While records you create and update in the UI are automatically indexed and made searchable within seconds, imported records or records updated by background processes aren't available for search until the indexing process completes.

4. As you browse or search, you can add multiple items to the cart by clicking the + (plus) icon.

5. Click the cart icon to change add pricing and quantity information, or to delete products and replace them with others:

Product Test: Product Catalog

Filter by Territory X

Q Enter a Product

Overview > Cart

Product Type	Product	Quantity	Estimated Price	Amount	Sales Credit	Actions
Product	Stellent LOB Appli...	1		\$ 0		⋮
Group	BIQA_CRM_PG3	1		\$ 0		⋮
Product	40825 - Quickcon...	1		\$ 0		⋮
Product	Stellent LOB Appli...	1		\$ 0		⋮
Group	BIQA_CRM_PG1	1		\$ 0		⋮

- To add pricing and quantity information, or to change the product, click **Actions** (the three horizontal dots icon highlighted in the screenshot) and select **Edit**.
- To delete the product, click **Actions** and select **Delete**.

6. When you're done adding and editing the items, click **Save**.

How do I add a list of values to the Category field for my Attachments in classic Sales?

You must set the profile option, Attachment Component Basic Enabled (ZCA_ATTACHMENT_ENABLE_BASIC), to No to display the Category field in the Attachments page for your sales objects in classic Oracle Sales. You can then add values to the Category drop-down list using the Manage Attachment Categories task.

You must use an attachment category to classify and secure an attachment. While adding attachments, you can view the available attachment categories and add the attachment to one of them. An attachment entity is usually a database entity, like, for example, a table or view, that represents a business object with which attachments are associated. For example, categories associated with the expense report attachment entity are available in the attachments UIs for expense reports.

The association between attachment entities and categories determines the use of categories for an entity. You can configure the associations when managing either entities or categories. Between the **Manage Attachment Entities** and **Manage Attachment Categories** pages, any change in association on one page automatically reflects on the other page.

Each attachment UI must be defined with a corresponding attachment entity. For example, the Opportunity object attachments must have the module set as **Opportunity Management** category and must be attached to the entity **MOO_OPTY**.

Related Topics

- [How Attachment Entities and Attachment Categories Work Together](#)
- [Attachments Troubleshooting](#)

Can I prevent account and contact creation with a custom job role?

Yes, you can. You can create a custom role without the required privileges to create accounts and contacts and then assign that role to the applicable users. Or, you can create your own access groups with different users that have different permissions.

To create a custom role, start with [How do I edit job or abstract roles?](#)

The privileges to create sales accounts and contacts are:

- Create Sales Account
- Create Sales Party Contact

To use access groups to assign permissions to certain groups of users, start with [How do I create and manage access groups?](#)

What user reports are there?

In Oracle Sales, there are a few useful reports that you can read to gain user insights.

Two reports you can run include:

- The User Role Membership Report: This report lists role memberships for specified users.
- User and Role Access Audit Report: This report shows function and data security privileges granted to specified users or roles.

In addition, the User System Usage subject area in Oracle Transactional Business Intelligence (OTBI) gives you information on user activities, such as which users haven't signed in for a period of time or who the top 10 active users are.

Tip: Use Last Activity Date column from this subject area to get user sign-on activity.

Be sure to run the [Refresh BI Reports Audit Data for User Adoption Reporting](#) scheduled process to refresh the BI report audit tables, and ensure that the profile option, User Session Activity Tracked (FND_TRACK_USER_ACTIVITY), is enabled.

See the related topics for more information.

Related Topics

- [How do I refresh BI reports audit data for user adoption reporting?](#)
- [User Role Membership Report](#)
- [User and Role Access Audit Report](#)
- [User System Usage subject area](#)

Can I restrict record access based on a field value?

Yes. You can create a custom role that restricts access to accounts, and then create an access group to grant access to members of the group based on field.

To create a custom role, start with [How do I edit job or abstract roles?](#)

To use access groups to assign permissions to certain groups of users, start with [How do I create and manage access groups?](#)

How do I integrate with Microsoft Teams?

Microsoft Teams provides functionality for collaboration, enabling users to communicate with teams and channels, and conduct web conferencing for seamless virtual meetings and teamwork.

Oracle provides different integration solutions with Microsoft Teams to cater for your specific sales application requirements.

For more information, see [Overview of Integrations with Microsoft Teams](#) in the How do I integrate Microsoft Teams with Redwood User Experience? solution playbook on the [Oracle Help Center Sales > Playbooks](#) page.

What are some SQL queries I can use to find user, resource, and person details?

There are a few SQL queries you can use to find user, resource, and person details.

You can use this query to check whether a user is suspended or not: `select * from per_users where username='<provide the username of the user>'`.

Or, use this one: `SELECT person_id, start_date, end_date, hr_terminated, suspended from per_users where username='&username';`.

To check whether that user has been created as a PERSON party, you can use the this SQL statement:

```
SELECT party.* FROM HZ_PARTIES party, PER_USERS pusr WHERE PARTY.USER_GUID = PUSR.USER_GUID AND  
pusr.USERNAME='<provide the username of the user'>.
```

Or:

```
select * from hz_parties where party_id in (select party_id from HZ_ORIG_SYS_REFERENCES where  
orig_system_reference='&PersonID_YouGotFromStep1');
```

To check whether a user is linked to a party record, use this query:

```
SELECT party.* FROM HZ_PARTIES party, PER_USERS pusr WHERE PARTY.USER_GUID = PUSR.USER_GUID AND  
pusr.USERNAME='<provide the username of the user'>.
```

To check whether a user has been defined as a Resource, use this SQL statement:

```
select * from  
JTF_RS_RESOURCE_PROFILES where PARTY_ID = (select party.party_id FROM HZ_PARTIES party, PER_USERS pusr WHERE  
PARTY.USER_GUID = PUSR.USER_GUID AND pusr.USERNAME='&username');.
```

How do I set Sales Account mapping for my opportunity territory assignment?

Opportunities are assigned to the opportunity owner's territory. The opportunity revenue gets included in the owner's forecast and passed up the management chain for adjustment and approval. You must map any new custom dimension for territory assignment to revenue lines.

Use the steps outlined here to set the sales account mapping for opportunity territory assignment.

1. In the **Setup and Maintenance** work area, go to the following:
 - o Offering: Sales
 - o Functional Area: Opportunities
 - o Task: Manage Sales Assignment Manager Objects
2. Select **Revenue**.
3. In the Candidates tab, select **Territory**.
4. In the **Moved to Territory: Mapping Set** tab, select the **Sales Account** mapping set.
5. In the Mappings table, click **Create**.
6. Select or enter values for these fields:
 - o Type: Attribute
 - o Exact Match: Select
 - o Function: Code: Enter the appropriate dimension code, such as Ext1
 - o Candidate Object: Territory
 - o Work Object: Revenue
 - o Candidate Object Attribute: Low: Dimension Member ID
 - o Work Object Attribute: Low: Select the appropriate field, such as Line of Business
7. Click **OK**.
8. Save and publish.

Can I import geography data for multiple countries in one import job?

No. You can submit only one import job for a country. After submitting the import job, you can search for a different country and submit another import job for that country. Currently, you can only search and import Loqate data for one country at a time using the Manage Geographies task in Setup and Maintenance menu.

Where can I find a list of OTBI prebuilt sales analytics?

Download [this Microsoft Excel spreadsheet](#). It contains a list of prebuilt Oracle Transactional Business Analysis (OTBI) analytics that's used in Oracle Sales. You can view additional prebuilt content in the following Catalog folder location: **Shared Folders > Sales**.

How do I make an employee a sales resource?

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

Employees or workers are created in HCM. You can then create a resource for the existing worker once it exists in HCM and has been synchronized to party data. You can create a resource and resource organization (optional) using resource user REST API, resource import, or the Resource Directory UI. However, these tools, that is, the resource user REST API or Import Management, or the Resource Directory UI shouldn't be used to create a resource for a worker that doesn't exist in HCM.

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

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

The employee is now also a sales resource.

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

Related Topics

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

How do I display the lookup meaning using the lookup code using Groovy in Fusion Goal?

Use this topic to learn how you can use Groovy to display the lookup meaning from the lookup code.

To display the values for the lookup meaning, add the following script to the formula field:

```
return nvl(getSelectedListDisplayValue('API_NAME_FIELD_OF_VALUE'), "")
```

In this script, replace the API_NAME_FIELD_OF_VALUE with the API of the lookup type field.

How do I restrict access to custom pages in Application Composer based on business unit?

Use this topic to provide conditional access to custom pages using Groovy.

You can duplicate the details page layout and then use Groovy to provide conditional access to it.

To restrict access based on the business unit, use the **OrgID** attribute. For example:

```
if (OrgId == 300000189822167)
    return true
else
    return false
```

What's the sort order of most recently used (MRU) records?

The application automatically tracks your user context and activities and generates a list of most recently used records. There's no configuration to affect the sorting order. You see the most relevant results based on your object activity and context.

However, if you've selected a record before searching for it, then the record will be listed in one of these ways:

- By typing a partial value and selecting a record from one of the autosuggested values
- By selecting a record from the **Search and Select** dialog box
- By selecting a record from the most recently used list

Note: You can add dynamic choice list (DCL) fields to the search results table, but for best performance reasons, sorting on those columns at runtime isn't available. Also, fixed choice lists added to the Search and Select dialog box might appear wider than other fields.

How do I change display labels (strings) to new custom values?

You can change the display labels (strings) that appear in your applications using the User Interface Text Tool. This tool, sometimes referred to as the String Editor, administers the vast majority of display labels. It's designed for bulk display label search and replace. This tool supports all installed languages and can be used to create and change locale-specific label values.

To change the text of an existing display label to a custom label value in Oracle Sales in the Redwood User Experience, see the topic [Modify Text Using User Interface Text Tool](#). For more information about field display labels, see [Field Display Labels](#).

What's the purpose of the Show Smart List filter in Workspace?

Smart lists (also known as My Lists) are based on near real-time user context and show records that are most relevant to Workspace users, based on their use and engagement with Sales. My Lists are also included along with saved searches in Sales in the Redwood UX list pages and in the Sales Dashboard.

The **Show Smart List** filter lists the most relevant and contextual records data to users once every 10 minutes and use a predefined relevancy scoring mechanism. This helps minimize navigation and searching in Workspace. For example, the My List for Opportunities includes opportunities ranked by the number of times a salesperson has opened each opportunity, along with its accounts and contacts, and how recently they opened these.

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.

What do I do when BI reports take a long time to open in Chrome?

If you're experiencing long delays when trying to edit reports in Oracle Business Intelligence, try clearing your Chrome browser cache.

Where can I find Oracle Sales in the Redwood User Experience training materials?

You can access a detailed library of Oracle Sales in the Redwood User Experience training materials including overviews, extensibility training, and other topics on Oracle Cloud Customer Connect: [Implementing Redwood Sales](#).

Where can I get an overview of Oracle Sales in the Redwood User Experience?

These pertinent videos on Oracle Cloud Customer Connect guide you through the beginnings of Oracle Sales in the Redwood User Experience:

- **Consumer Grade +:** Watch this video to learn about the radical transformation that Oracle Sales in the Redwood User Experience is a part of.
- **Introduction to Oracle Sales Cloud** and **Demonstration of the Redwood Sales experience:** Watch these videos to get an overview of Sales in the Redwood User Experience.

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I quickly get up and running with Oracle Sales in the Redwood User Experience?

Cut to the chase and quickly learn how to opt-in to Oracle Sales in the Redwood User Experience. Also learn how to create a project in Oracle Visual Builder Studio to begin customizing the app.

Find out more in this video on Oracle Cloud Customer Connect: [Quick Start for Turning On Redwood Sales](#)

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How does the Redwood design help Sales users?

Learn how the Oracle Redwood User Experience design creates an experience that can help Sales users do tasks quicker and easier.

Watch this video on Oracle Cloud Customer Connect to find out more: [How to Think About Adopting Redwood Sales](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

What's included in the Oracle Sales in the Redwood User Experience UI and what are the tools to extend it?

These three videos explain the types of pages in the Oracle Sales in the Redwood User Experience UI and the role of the tools you use to extend them: Application Composer and Oracle Visual Builder Studio.

The videos are all on Oracle Cloud Customer Connect.

- [Anatomy of a Redwood Sales Application](#) provides an overview of the UI.
- [Thinking Inside the Box](#) shows you what types of information you can configure and at what level of granularity.
- [Introduction to the Tooling for Extending Redwood Sales](#) explains the role played by Application Composer and VB Studio.

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

What do I need to do in Oracle Visual Builder Studio before creating my Oracle Sales extensions?

View these four videos to learn what you need to do before you can start configuring Oracle Sales in the Redwood User Experience UI with Oracle Visual Builder Studio.

The videos are all on Oracle Cloud Customer Connect.

- [Accessing Visual Builder Studio](#) explains how you gain access to VB Studio and how to launch it.
- [Workspaces, Branches and Sandboxes](#) explains how you work with workspaces and branches in VB Studio.
- [Create the Visual Builder Studio Project](#) covers the two ways you can create a VB Studio project and how you can ensure that the project Extension ID is set to `site_cxsales_Extension`, the required value for Oracle Sales.
- [Create a Workspace](#) shows you how to create a workspace within your project.

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I learn techniques for creating extensions in Oracle Visual Builder Studio for my Oracle Sales application?

View these videos on Oracle Cloud Customer Connect to learn Oracle Visual Builder Studio techniques that are useful for extending Oracle Sales in the Redwood User Experience:

- Speed up the creation of extensions in VB Studio by using [CX Extension Generator](#), a feature that's available in Application Composer.
- Add a field to a page using VB Studio: [Adding a Field to a Form and Changing the Default Rendering](#)
- Edit the header section of a details page and add a field: [Adding a Field to the Header Form and Changing the Default Rendering](#)
- Add conditions to display a particular layout by job role, opportunity sales method, or opportunity sales stage: [Conditional Rendering of Dynamic Layouts](#)
- Add, delete, and change the order of panels in the detail views of each record: [Control the Panel Views and Display Order](#)
- Change the fields that display on a contacts panel for an account: [Modifying the Data on a Panel](#)
- Configure the subview (the page that displays all the records that belong to a particular panel): [Extending the Subview](#)
- Control how to align fields on an edit page and how many lines to show in a long-text field: [Group Fields and Long Text](#)
- Create a rule at the client to provide immediate feedback to the user when they enter valid and invalid values. This video uses the birth date as an example: [Client Side Field Rules](#)

- Calculate the results of formula field changes at the client: *Client Side Calculations*
- Render a field as a check box: *Check box (Boolean) Fields*
- Add mashups that display in the subviews in a record: *Mashups*

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

Can I define multilingual custom objects using Application Composer?

Use this topic to know how you can define multilingual custom objects in Application Composer.

Yes. You can first define a custom object using the base language English and then change the translations on the UI.

If you've a drop-down list, its values are translated in Application Composer through **Functional Setup Manager > Manage Standard Lookups**. If a contact lookup is a person's name, it will be displayed as is regardless of whether your sign in language is English or Japanese.

How do I save and deploy my extension for Oracle Sales in the Redwood User Experience?

View these four videos on Oracle Cloud Customer Connect to learn how to deploy the Sales extensions you created in Oracle Visual Builder Studio.

- Commit, push, and reset commands and Git repositories: *Saving to Source Control*
- Package and deploy your extension to all users of the test environment: *Deploying Extensions to the -TEST Environment*
- Package and deploy the extension to the production environment: *Deploying Extensions to the -PROD Environment*
- Remove a deployed extension from development, test, or production environments: *Remove a Build From an Environment*

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I manage activities and interactions in Mobile?

Discover how the Mobile app lets salespeople manage Sales Activities like appointments, interactions, and tasks better and more easily.

Watch this video on Oracle Cloud Customer Connect to see more: [Prerequisites for Implementing Redwood Sales](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I get an overview of Mobile?

Get a deep dive into the mobile features and functionality with this video on Oracle Cloud Customer Connect: [Mobile Introduction and Overview](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

What are the prerequisites for Sales in the Redwood User Experience?

Learn the basics about the prerequisites for moving to the Redwood User Experience if you're an existing Oracle Sales customer.

For more details, watch this video on Oracle Cloud Customer Connect: [Prerequisites for Implementing Redwood Sales](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How do I troubleshoot JavaScript and capture HAR files for extensions created in Oracle Visual Builder Studio?

Learn how to troubleshoot JavaScript and capture HAR files that you can share with Oracle Support when developing extensions for Oracle Sales in the Redwood User Experience.

A HAR (HTTP Archive) file is a JSON-formatted log of a web browser's interactions with your cloud application. It's a useful tool for debugging and troubleshooting performance issues, authentication issues, and error codes.

See these videos on Oracle Cloud Customer Connect for more information:

- Troubleshoot JavaScripts: [Troubleshooting](#)
- Capture a HAR file that you can share with Oracle Support: [Troubleshooting-Capture a HAR File](#)

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I customize the Mobile app for my users?

You can configure layouts, enable and disable fields, and more on the Mobile app.

Watch this video on Oracle Cloud Customer Connect to learn more: [Configuring and Tailoring the Mobile Experience](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

What are some of the advanced features of Mobile?

Explore some of the advanced features of Mobile, including push notifications on the Apple watch.

To learn more, watch this video on Oracle Cloud Customer Connect: [Advanced Mobile Features](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I work with opportunities and progress my deals on Mobile?

Discover how the Mobile app lets salespeople work with opportunities and progress their deals.

To learn more, watch this video on Oracle Cloud Customer Connect: [Opportunities](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I see and follow up with leads and accounts near me with Mobile?

Salespeople can use the Around Me feature in Mobile to see and follow up with leads and accounts near them.

Watch this video on Oracle Cloud Customer Connect to discover more: [Leads and Around Me](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

Where can I find resources about how to implement and use Forecasting in Oracle Sales in the Redwood User Experience?

Use these pertinent videos and resources on Oracle Cloud Customer Connect and Oracle Help Center to learn more about Forecasting in Oracle Sales in the Redwood User Experience (Sales in the Redwood UX). These resources can help guide you about how to implement and use Sales Forecasting. They also provide troubleshooting tips and things to consider when using the feature.

- Implementing Sales Forecasting
 - [Sales Forecasting by Opportunity](#): Watch this video to get a step-by-step guide to configure Sales Forecasting by opportunity.
 - [Extending Sales Forecasting](#): Watch this video which provides an overview of the available options for extending Sales Forecasting.
 - [Sales Forecasting Scheduled Processes](#): Watch this video for an overview of the Sales Forecasting processes, the default schedule, and other processes to run after enabling Sales Forecasting.
 - [Sales Forecasting BI Reports](#): Watch this video for an overview of Sales Forecasting BI reporting and subject areas available when forecasting by opportunity owner rolling up the resource hierarchy.
 - [Configure the Sales Dashboard for Sales Reporting](#): Watch this video for an overview of Sales Forecasting BI reports in the Sales Dashboard using the subject areas available when forecasting by opportunity owner rolling up the resource hierarchy.
- Troubleshooting Sales Forecasting
 - Click [here](#) for some troubleshooting tips and tricks about how to get Sales Forecasting by Opportunity Revenue rolling up the territory hierarchy up and running.
 - [Sales Forecasting Tips and Considerations](#): Watch this video for some useful tips to consider when using Sales Forecasting in the Redwood User Experience.
 - [Troubleshooting Sales Forecasting](#): Watch this video for some useful troubleshooting tips around resources, opportunity updates and resources, territory hierarchy, and forecast data.
- Using Sales Forecasting
 - [Empower Managers to Hold Reps Accountable for Their Sales Forecast](#): Watch this video to learn how Sales Forecasting in Redwood user experience allows sales managers to hold their reps accountable to their opportunity commitments and track the forecast trends throughout quarterly, yearly or fiscal periods.
 - [Sales Forecasting Rollup by Territory](#): Watch this video to get an overview of using Sales Forecasting when forecasting by opportunity revenue rolling up the territory hierarchy.

For more information, see [About Forecasting for Oracle Sales in the Redwood User Experience](#) in the How do I get started with Sales Forecasting? solution playbook on the [Oracle Help Center Sales > Playbooks](#) page.

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

What are some useful tips to consider when using Forecasting in Oracle Sales in the Redwood User Experience?

Get useful tips about Forecasting in Oracle Sales in the Redwood User Experience. These resources will help guide you how to implement and use Sales Forecasting. You also get troubleshooting tips for forecasting by opportunity revenue, rolling up the territory hierarchy.

- [Sales Forecasting Tips and Considerations](#): Watch this video on Oracle Cloud Customer Connect to for useful tips to consider when using Sales Forecasting in the Redwood User Experience.
- Click [here](#) for some troubleshooting tips and tricks about how to get Sales Forecasting by Opportunity Revenue rolling up the territory hierarchy up and running.

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How do I configure Forecasting by opportunity in Oracle Sales in the Redwood User Experience?

Forecasting by opportunity is the default forecasting type in Oracle Sales in the Redwood User Experience. Forecasting by opportunity is where opportunity revenue is automatically included in the forecasts of the opportunity owner. Salespeople own their opportunities and forecast them. The forecasts are passed up the resource hierarchy for adjustment and endorsement.

Watch this video on Oracle Cloud Customer Connect to get a step-by-step guide on how to configure Sales Forecasting by opportunity in the Redwood User Experience: [Sales Forecasting by Opportunity](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How do I programmatically modify data entered in a page before it's saved?

Explore how you can use Oracle Visual Builder Studio to programmatically modify data entered in an Oracle Sales in the Redwood User Experience page before the data is saved in the database.

View this video on Oracle Cloud Customer Connect to learn more: [Modify Data Before Saving](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

In Oracle Visual Builder Studio, how do I show a different layout for different values of a field in a parent object?

View the following video on Oracle Cloud Customer Connect to learn how to display different layouts on a child object, such as a revenue line, when a value in the parent object, such as an opportunity, changes in Oracle Sales in the Redwood User Experience. For example, you can display different fields on the Edit Opportunity Revenue Lines page, depending on which sales method is selected in the opportunity: [Parent Record Condition on Child Dynamic Layout](#)

How can I make long-text fields resizable in Oracle Sales in the Redwood User Experience?

View the following video on Oracle Cloud Customer Connect to learn how to use Oracle Visual Builder Studio to configure the long-text field so that users in the Redwood UI can resize the field by dragging its boundaries: [Resizable Text Area](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I enable the use of synonyms in the Action Bar?

Learn how to add synonyms to Oracle Sales in the Redwood User Experience so that salespeople can use their preferred terms in the Action Bar, in addition to the terms provided Oracle.

For example, adding the terms "customer" and "client", retrieves the same suggestions as entering "account", the term provided by Oracle.

See this video on Oracle Cloud Customer Connect to find out more: [Synonyms](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I create a smart action that opens a URL that's specific to a field value?

View the following video on Oracle Cloud Customer Connect to learn how to create a smart action that opens a URL that's specific to a field value of the displayed record: [Open URL In a New Window](#)

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How do I create and translate strings for pages in Oracle Sales in the Redwood User Experience?

Learn how to create a title on a Oracle Sales in the Redwood User Experience UI page with singular and plural wording. The title wording depends on the value of a field in the record. You'll also see how to translate the string into other languages.

View this video on Oracle Cloud Customer Connect to find out more: [Translate Strings](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

Can you provide an example of importing geography data?

This example demonstrates how to import data using Import Management.

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

Summary of the Tasks

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

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

Before You Start

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

Determine the Information in the Source File

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

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

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

RecordType	PrimaryGeogr	CountryCode	LevelNumber	SourceId	ParentSourceId	IdentifierType	IdentifierSubT	IdentifierValue
0	India	IN	1	1				
1	Karnataka	IN	2	2	1			
1	Bengaluru	IN	3	3	2			
2	Bengaluru	IN	3	3	2	NAME	Standard_Name	Bangalore
1	Whitefield	IN	4	4	3			

RecordType	PrimaryGeogr	CountryCode	LevelNumber	Sourcel	ParentSource	IdentifierType	IdentifierSubT	IdentifierValue
1	560066	IN	5	5	4			
2	560066	IN	5	5	4	CODE	ISO_C OUNTRY_ CODE	91

Note: Keep a note of the following:

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

Attribute Name	Value	Description
RecordTypeCode	1	The record type code that represents the intent of the import data. The values are: 0 - indicates the geography that already exists in the base table. 1 - indicates the intent to create a new geography. 2 - indicates the intent to add an alternate identifying name or code to an existing geography.
PrimaryGeographyName	India	This is the primary geography name. This will be marked as the primary name for the Geography and also displayed in the Manage Geographies Page.
CountryCode	IN	This indicates the Country Code for the country for which you're importing data.

Attribute Name	Value	Description
LevelNumber	2	The level number of the geography in the hierarchy. For example, Country is at Level 1 and State (California) is at Level 2.
SourceId	2	The source ID for the geography, along with the parent source ID is used to identify the geography parent and child relationship within the source file data and the interface table data.
ParentSourceId	1	The parent source ID for the geography, along with the source ID is used to identify the geography's parent and child relationship with records within the source file data. This should be null for the country record, as Country is at the top of the hierarchy.
IdentifierType	Name	The type of the identifier. It can be either Name or Code.
IdentifierSubtype	Standard_Name or Standard_Code	The IdentifierSubtype can be Standard_Name or Secondary_Name. The default value is Standard_Name. The valid Sub Types for Type "CODE" are FIPS_CODE, GEO_CODE, ISO_COUNTRY_CODE, PRIMARY_CITY, or UNKNOWN
IdentifierValue	Bangalore	The value of the identifier.

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

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

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

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

What conversational interactions can I have with Oracle Sales Assistant in CX Sales Mobile?

Oracle Sales Assistant is a chatbot that you can use to access sales information and perform sales activities through either text or voice in Oracle CX Sales Mobile. You can enter questions or dictate 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 your sales records,

Manage Sales with Conversational Experiences: Watch this video to get an overview of how you perform end-to-end task flows using natural language conversations with sales through CX Sales mobile's use of the sales assistant.

Where can I get an overview of configuring conversational features of Oracle Sales Assistant in CX Sales Mobile?

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.

Configure the Conversational Experiences: Watch this video to get an overview of how you change the sales assistant help text to make the answer more relevant in response to a user's request through CX Sales mobile's use of the sales assistant.

How do I use forecasting by opportunity revenue that rolls up the territory hierarchy in Oracle Sales in the Redwood User Experience?

Forecasting by opportunity revenue is an alternative forecasting type for Oracle Sales in the Redwood User Experience forecasting users. This forecasting scenario uses opportunity revenue forecasting that rolls up the territory hierarchy – when you use sales territories to assign opportunities.

You assign opportunities to sales territories by geography, product, industry, and other dimensions. You might have multiple salespeople from different parts of the sales organization involved in the sale. The opportunity owner isn't necessarily the sole person forecasting the revenue. If your implementation meets any of these criteria, then you must set up your forecast type **By opportunity revenue rolling up territory hierarchy**.

Sales Forecasting Rollup by Territory: Watch this video on Oracle Cloud Customer Connect to get an overview of using Sales Forecasting when forecasting by opportunity revenue and rolling up the territory hierarchy.

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How do I troubleshoot JavaScript and capture HAR files for extensions created in Oracle Visual Builder Studio?

Learn how to troubleshoot JavaScript and capture HAR files that you can share with Oracle Support when developing extensions for Oracle Sales in the Redwood User Experience.

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See these videos on Oracle Cloud Customer Connect for more information:

- Troubleshoot JavaScripts: [Troubleshooting](#)
- Capture a HAR file that you can share with Oracle Support: [Troubleshooting-Capture a HAR File](#)

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How do I concatenate fields into a single field in Oracle Visual Builder Studio?

View the following video on Oracle Cloud Customer Connect to learn how to use a virtual field in VB Studio to concatenate fields into a single field. You can then display the virtual field on a page in Oracle Sales in the Redwood User Experience page: [Concatenate Fields](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I create a smart action that opens a drawer with custom content in Oracle Sales in the Redwood User Experience?

View the following video on Oracle Cloud Customer Connect to learn how to create a smart action to open a drawer with custom content using Oracle Visual Builder Studio: [Custom Drawer](#).

How do I add the attachments component to pages in Oracle Sales in the Redwood User Experience?

View the following video on Oracle Cloud Customer Connect to learn how to use Oracle Visual Builder Studio to add the attachments component to a panel, a subview, and the create record page: [Working with Attachments](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I perform mass deletion of transactions?

Here's how you can perform mass deletion of transactions:

- On the Manage Transactions page, search and select transactions.
- Select **Action > Cancel Transactions**.

After the transaction is canceled, run the Revert Transactions job.

- Import transactions again with zero transaction amount and run all the jobs.
- Run the Purge Incentive Compensation Transactional Test Data job for the business unit to delete all the transactions related data for that business unit and then load the valid data again.

How can I do attainment calculations for performance measures?

Here's how you can do attainment calculations for performance measures:

Add performance measure formulas on the Define Measure Formula page in the Compensation Plans work area.

Sample Attainment Calculations

Use the Expression Name field to create and associate an expression with the performance measure.

This table describes sample attainment calculations and provides the corresponding expressions.

Table

Calculation Description	Expression
Calculate the volume attainment for each transaction and provide the quantity as the output using the expression.	<code>Credit.Quantity</code>
Calculate the attainment for each transaction and provide the amount as the output. Also, adjust the attainment for different credit categories using percentage credit factors.	<code>Credit.Credit Amount * Measure.Credit Factor</code>
Calculate the revenue attainment for each interval. You can use this calculation to compute earnings as a percentage of this attainment.	<code>SUM(Credit.Credit Amount)</code>
Calculate the target incentive, or quota attainment, for each quarter. You can use this calculation to compute earnings as a percentage of the eligible target incentive for the quarter.	<code>SUM(Credit.Credit Amount / Measure.Interval Quota) SUM(Credit.Credit Amount / Measure.Interval Target)</code>

How can I perform multiple participant calculations for a single transaction in incentive compensation?

You can use the direct credit rule option to perform multiple participant calculations for a single transaction.

What processes do I need to run after enabling Forecasting in Oracle Sales in the Redwood User Experience?

After you enable Forecasting in Oracle Sales in the Redwood User Experience (Redwood UX), the Generate Sales Forecast Metrics process is automatically run without parameters. This process performs the initial calculation of all sales forecasting metrics used throughout your Redwood UX application.

If you're using the default Forecast by Opportunity Owner method, then the Generate Sales Forecast Metrics process is used to update resources and the resource hierarchy. If you're using the Forecast by Opportunity Revenue method, then the process is used to update territories and the territory hierarchy, as well as products and the product hierarchy.

Watch this video on Oracle Cloud Customer Connect to get an overview of the Sales Forecasting processes, the default schedule, and other processes to run after enabling Sales Forecasting: [Sales Forecasting Processes](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How do I extend Sales Forecasting in Oracle Sales in the Redwood User Experience?

You can extend Forecasting in Oracle Sales in the Redwood User Experience (Redwood UX) to suit your forecasting requirements. For example, sales managers can view and access key opportunity information for sales forecasts in the Redwood UX by using the Edit Opportunity smart action. You can use Oracle Visual Basic Studio to configure the fields and layout of the Edit Opportunity drawer.

If you're using the Forecast by Opportunity Revenue method of forecasting, then you can filter opportunities by product group. This video an overview of extending sales forecasting by:

- Enabling the Edit Opportunity smart action
- Extending the Opportunity card
- Extend the Opportunity summary drawer to include Activities and Team Members

Watch this Oracle Cloud Customer Connect video to learn how to enable the Edit Opportunity smart, extend the Opportunity card, and to extend the Opportunity summary drawer to include Activities and Team Members: [Extending Sales Forecasting](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

What Sales Forecasting BI reports and subject areas are available when forecasting by opportunity owner?

In Oracle Sales in the Redwood User Experience, sales managers can generate and view reports for their and their team's forecast and quotas for active periods by using subject areas in Oracle Transactional Business Intelligence (OTBI).

Watch this video on Oracle Cloud Customer Connect which provides an overview of Sales Forecasting BI reporting and subject areas available when forecasting by opportunity owner and rolling up the resource hierarchy: [Sales Forecasting BI Reports](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

Where can I find troubleshooting tips for Forecasting in Oracle Sales in the Redwood User Experience?

Sometimes you might experience forecasting issues in Oracle Sales in the Redwood User Experience, such as displaying resource or territory hierarchy data, or you're wondering why your opportunity updates aren't reflected in the forecast data. This video on Oracle Cloud Customer Connect can help you troubleshoot and solve such issues.

Troubleshooting Sales Forecasting: Watch this video for some useful troubleshooting tips around resources, opportunity updates and resources, territory hierarchy, and forecast data.

How do I map a custom object field in Customer Data Management to pull credit limit from Account Receivables using Application Composer?

Use this topic to learn how to extract the credit limit from Account Receivables using Application Composer.

You can write a Groovy script to call the API and retrieve the credit limit in a custom field. If you're defining this field as a formula field, you must set this value programmatically in a persistent custom field because a *formula field* might have some performance impact.

Here's an example:

```
/** Account Credit Limit **/  
try  
{  
    def accountNumber = getAttribute("LegacyAccountNumber_c");  
    println("Account Number :"+accountNumber)  
    if(accountNumber != null){  
        def customerProfile =  
        [  
            AccountNumber:accountNumber  
        ]  
        def custProfileValue =  
        adf.webServices.FA_OCF_Account_Profile_Service.getActiveCustomerProfile(customerProfile)  
        if(custProfileValue != null){  
            println("custProfileValue:"+custProfileValue)  
            println("Account creditLimit:"+custProfileValue.Value.CreditLimit)  
            return custProfileValue.Value.CreditLimit.first().first()  
        }  
    }  
}  
catch (Exception e)  
{  
    println "Message: " + e.getMessage();  
    println "Localized Message: " + e.getLocalizedMessage();  
}
```

When I migrate customizations using Application Composer, would the field-value mappings also migrate?

Use this topic to know how to migrate field value mappings when migrating customizations using Application Composer.

No. You'd need to define the field-value mapping manually after you migrate customizations. Also, after you import a configuration into a target environment, you must examine the target environment for any changes that you might need to make manually

The value mapping here refers to the parent-child value map you create for custom fixed choice list fields. For actual field-value mapping, you must perform data import operation.

How do I configure a smart list for DCL Fields in Oracle Sales in the Redwood User Experience?

Learn how to configure an Oracle Adaptive Search-based smart list to use with dynamic choice list (DCL) fields in Oracle Sales in the Redwood User Experience.

Watch this video on Oracle Cloud Customer Connect for a step-by-step demonstration on how to configure a smart list for use with Adaptive Search DCL fields: [CX Smart List](#).

How do I change what items appear on the navigation bar in Oracle Sales in the Redwood User Experience?

Learn how to change which items appear in the navigation bar in Oracle Sales in the Redwood User Experience by watching the following video on Oracle Cloud Customer Connect: [In App Navigation Bar](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How do I add an action menu for records listed on one of the panels on a record in Oracle Sales in the Redwood User Experience?

View the following video on Oracle Cloud Customer Connect to learn how to use Oracle Visual Builder Studio to add an action menu to panels on the record details page: [Enable the ... Action Menu for Records in the Panel Lists](#). The action menu you're adding is the same one that appears for each record on the list page. It includes the same smart actions.

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I simplify referencing saved searches in multiple environments in Oracle Sales in the Redwood User Experience?

Saved searches have different unique identifiers (UUIDs) in every environment in Oracle Sales in the Redwood User Experience. Moving your Sales Dashboard extensions from one environment to another normally requires you to manually update all of the references. View this video on Oracle Cloud Customer Connect to learn how to make the references work in all environments by creating a lookup. Creating this key abstraction makes one reference work in all environments: [Sales Dashboard UUID Key Abstraction](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I filter the contents of the panels in an Oracle Sales in the Redwood User Experience record?

View this video on Oracle Cloud Customer Connect to learn how to filter the contents of the panels in a record details page using Oracle Visual Builder Studio: [Customize Panel Query](#)

Here's sample code for the different type of queries shown in the video:

ADF Child

```
<template id="accountContact">
```

```
<oj-vb-fragment name="oracle_cx_fragmentsUI:cx-panel">

<oj-vb-fragment-param name="resource" value='[[ {"name": "accounts", "primaryKey": "PartyId", "puid":
"PartyNumber", "endpoint": "cx" } ]]'>
</oj-vb-fragment-param>

<oj-vb-fragment-param name="sortCriteria" value='[[ [{"attribute": "ContactName", "direction":
"descending" } ] ]]'> </oj-vb-fragment-param>

<oj-vb-fragment-param name="query" value='[[ [{"type": "selfLink", "params": [{"key": "accounts_Id",
"value": $page.variables.puid } ] } ]]'>
</oj-vb-fragment-param>

<oj-vb-fragment-param name="child" value='[[ {"name": "AccountContact", "primaryKey": "ContactPartyId",
"relationship": "M2M", "displayField": "ContactName",
"resource": "contacts" } ]]'></oj-vb-fragment-param>

<oj-vb-fragment-param name="context" value="[[ { UpdateFlag: true, DeleteFlag:
true, 'verificationStatusValidity': 'false',
'emailVerificationEnabled': 'false', 'verificationEnabled': 'false' } ]]"></oj-vb-fragment-param>

</oj-vb-fragment>

</template>
```

ADF Query by Example (QBE)

```
<template id="accountOpportunities">
<oj-vb-fragment name="oracle_cx_fragmentsUI:cx-panel">
<oj-vb-fragment-param name="resource" value='[[ {"name": "opportunities", "primaryKey": "OptyId",
"endpoint": "cx" } ]]'></oj-vb-fragment-param>
<oj-vb-fragment-param name="sortCriteria" value='[[ [{"attribute": "LastUpdateDate", "direction":
"descending" } ] ]]'> </oj-vb-fragment-param>
<oj-vb-fragment-param name="query" value='[[ [{"type": "qbe", "provider": "adfRest", "params": [{"key":
"TargetPartyId", "value": $page.variables.id } ] } ]]'>
</oj-vb-fragment-param>
<oj-vb-fragment-param name="context" value="[[ { } ]]"></oj-vb-fragment-param>

<oj-vb-fragment-param name="header" value="[[ { 'primary':
$page.variables.rollups.SumOfOpenOpportunitiesRevenue } ]]"></oj-vb-fragment-param>
</oj-vb-fragment>
</template>
```

Adaptive Search Query by Example (QBE)

```
<template id="accountOpportunities">
<oj-vb-fragment name="oracle_cx_fragmentsUI:cx-panel">
<oj-vb-fragment-param name="resource" value='[[ {"name": "opportunities", "primaryKey": "OptyId",
"endpoint": "cx" } ]]'></oj-vb-fragment-param>
<oj-vb-fragment-param name="sortCriteria" value='[[ [{"attribute": "LastUpdateDate", "direction":
"descending" } ] ]]'> </oj-vb-fragment-param>
<oj-vb-fragment-param name="query" value='[[ [{"type": "qbe", "params": [{"key": "TargetPartyId", "value":
$page.variables.id } ] } ]]'></oj-vb-fragment-param>
<oj-vb-fragment-param name="context" value="[[ { } ]]"></oj-vb-fragment-param>

<oj-vb-fragment-param name="header" value="[[ { 'primary':
$page.variables.rollups.SumOfOpenOpportunitiesRevenue } ]]"></oj-vb-fragment-param>
</oj-vb-fragment>
</template>
```

Adaptive Saved Search

```
<template id="accountOpportunities">
<oj-vb-fragment name="oracle_cx_fragmentsUI:cx-panel">
<oj-vb-fragment-param name="resource" value='[[ {"name": "opportunities", "primaryKey": "OptyId",
"endpoint": "cx" } ]]'></oj-vb-fragment-param>
<oj-vb-fragment-param name="sortCriteria" value='[[ [{"attribute": "LastUpdateDate", "direction":
"ascending" } ]]'></oj-vb-fragment-param>
<oj-vb-fragment-param name="query" value='[[ [{"type": "savedSearch", "params": [{"key": "queryUuid",
"value": "01f5924d-d14f-4382-978f-b042eff567b7" } ]}] ]]'>
</oj-vb-fragment-param>
<oj-vb-fragment-param name="context" value="[[ { } ]]"></oj-vb-fragment-param>
<oj-vb-fragment-param name="header" value="[[ { 'primary':
$page.variables.rollups.SumOfOpenOpportunitiesRevenue } ]]"></oj-vb-fragment-param>
</oj-vb-fragment>
</template>
```

Adaptive Saved Search Combined with Adaptive Search Query by Example (QBE)

```
<template id="accountOpportunities">
<oj-vb-fragment name="oracle_cx_fragmentsUI:cx-panel">
<oj-vb-fragment-param name="resource" value='[[ {"name": "opportunities", "primaryKey": "OptyId",
"endpoint": "cx" } ]]'></oj-vb-fragment-param>
<oj-vb-fragment-param name="sortCriteria" value='[[ [{"attribute": "LastUpdateDate", "direction":
"ascending" } ]]'></oj-vb-fragment-param>
<oj-vb-fragment-param name="query" value='[[ [{"type": "savedSearch", "params": [{"key": "queryUuid",
"value": "01f5924d-d14f-4382-978f-b042eff567b7" } ]}],
{"type": "qbe", "params": [{"key": "TargetPartyId", "value": $page.variables.id } ]}] ]]'></oj-vb-fragment-
param>
<oj-vb-fragment-param name="context" value="[[ { } ]]"></oj-vb-fragment-param>

<oj-vb-fragment-param name="header" value="[[ { 'primary':
$page.variables.rollups.SumOfOpenOpportunitiesRevenue } ]]"></oj-vb-fragment-param>
</oj-vb-fragment>
</template>
```

Differences Between ADF QBE and Adaptive QBE

One key difference between the ADF QBE and the Adaptive QBE is that, even though both have an implicit AND across the various filters, the ADF REST QBE can be set to explicitly run an OR operation across the filters.

For example:

- Adaptive QBE query supports only the AND operation between the filters:

```
<oj-vb-fragment-param name="query" value='[[ [{"type": "qbe", "params": [{"key": "SACustomer1_Id_c",
"operator": "$in", "value": [$variables.id] }, {"key": "Status", "operator": "$in", "value":
["Open" ] } ]}] ]]'>
</oj-vb-fragment-param>
```

- ADF QBE supports an implicit AND, but can be set to support an OR with the conjunction parameter:

```
<oj-vb-fragment-param name="query" value='[[ [{"type": "qbe", "provider": "adfRest", "params":
[{"key": "TargetPartyId", "value": $base.page.variables.id }, {"key": "StatusCode", "value": "Open",
"conjunction": "OR" } ] ]]'>
</oj-vb-fragment-param>
```

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

Is it possible to turn off the function that automatically sets the sales stage order to the last stage for my won opportunities?

No. 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.

Note: You can insert new stages between sales stages, for example, if you're changing a sales method for your opportunities or changing opportunity close requirements. 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.

How do I remove a contact from an Opportunity?

You can remove an Opportunity Contact by clicking **View All Contacts** on the **Contacts** panel in the Opportunity Summary page. Select the contact you want to delete from the Actions menu (3 horizontal dots) and click **Delete** to remove the contact association from the opportunity.

Note: You can't remove the Primary Contact from the Opportunity.

Related Topics

- [What are the privileges required to delete sales accounts and contacts?](#)

How can I override the Filter by Territory default search option when searching for all available products?

To override the **Filter by Territory** default search option to search for all available products, you can create a field template using the following sample Groovy script.

```
<template id="productGroupPickerTemplate">
```



```
<oj-vb-fragment name="oracle_cx_fragmentsUI:cx-picker" bridge="[[ vbBridge ]]" :id="[[ $fieldName + '-' +
cxcore.utils.generateUID() ]]">

<oj-vb-fragment-param name="resource" value='[[ {"name": "catalogProductGroups", "displayField":
"ProductGroupName", "primaryKey": "ProdGroupId", "endpoint": "cx" } ]]'></oj-vb-fragment-param>

<oj-vb-fragment-param name="extensionId" value="{ 'oracle_cx_salesUI' }"></oj-vb-fragment-param>

<oj-vb-fragment-param name="dynamicLayoutContext" value="[[ $dynamicLayoutContext ]]"></oj-vb-fragment-
param>

<oj-vb-fragment-param name="createConfig" value="[[ { 'enabled': false } ]]"></oj-vb-fragment-param>

<oj-vb-fragment-param name="pickerLayoutId" value="[[ 'PickerLayout' ]]"></oj-vb-fragment-param>

<oj-vb-fragment-param name="sortCriteria" value="[[ [{attribute: 'Name', direction: 'ascending'}] ]]"> </
oj-vb-fragment-param>

<oj-vb-fragment-param name="pickerNameField" value="{ $value.pickerNameField }"></oj-vb-fragment-param>

</oj-vb-fragment>

</template>
```

This sample Groovy script will allow users search for and access the complete product list without other filtering.

How do I get the Opportunity object ID from Oracle Fusion CX?

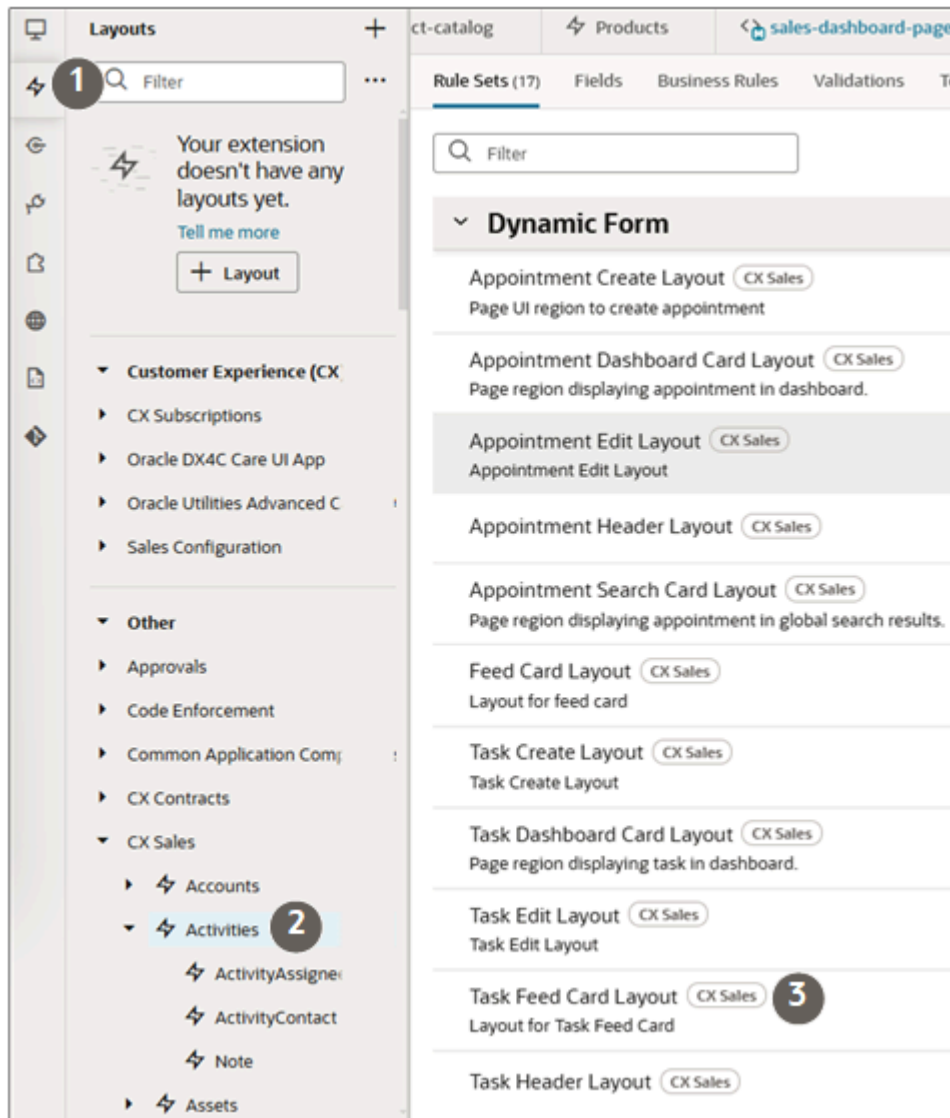
You can retrieve the number (ID) for the opportunity object in a few ways. For example, see [Details of MOO_OPTY Table](#) to identify the OPTY_ID from the MOO_OPTY table. You can also retrieve the opportunity number by making the opportunity **Number** (OptyNumber) field visible in the opportunities UI.

How can I change which fields appear in the Activities panel in Oracle Sales in the Redwood User Experience?

You can change which fields display in the activities listed on the Activities panel in sales records. You can substitute or remove fields by duplicating the Task Feed Card Layout and editing the copy in Oracle Visual Builder Studio.

1. Open a record with the Activities panel, such as an opportunity.
2. Edit the page in Oracle Visual Builder Studio.
3. Click the **Layout** tab (callout 1 in the following screenshot).
4. Open the **CX node** and click **Activities** (callout 2).

5. In the middle panel, drill into the **Task Feed Card Layout** (callout 3).



6. Duplicate the layout.
7. Edit the duplicate layout.
8. Scroll down. You can edit the fields displayed on the panel in the **Item1**, **Item2**, and **Item3** fields.

How do I move Mobile to the Oracle Sales in the Redwood User Experience interaction data model to record communications between salespeople and customers?

Oracle Sales in the Redwood User Experience (Sales in the Redwood UX) uses the "interaction data model" to record items like appointments, calls, and emails between salespeople and customers. For Oracle CX Sales Mobile, you can move to the Sales in the Redwood UX interaction data model to record communications. Moving the Mobile app to Redwood interactions model ensures both UIs are using the same data model for interactions.

See this video on Oracle Cloud Customer Connect for more information: [Adopting the Interaction Data Model for Mobile](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I integrate Oracle Sales in the Redwood User Experience with Microsoft Exchange using the Outlook add-in?

Maximize salesperson activities with automatic sync between Oracle Sales in the Redwood User Experience and Microsoft Exchange.

To learn more, see this video on Oracle Cloud Customer Connect: [Integrating Microsoft Exchange with CX Sales](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

What privileges do I need to enable and use Forecasting in Oracle Sales in the Redwood User Experience?

Before you can start configuring Forecasting in Oracle Sales in the Redwood User Experience (Sales in the Redwood UX), you must be an administrator with the assigned, configured job role.

To enable Sales Forecasting for Redwood UX, you must have these privileges:

Privilege and Name	Description
ZSF_SETUP_DIGITAL_SALES_FORECAST Setup Sales Forecasting from Digital Sales (Redwood UX)	Allows setting up sales forecasting and running processes from Redwood UX.
ZSF_EXPORT_IMPORT_DIGITAL_SALES_FORECAST_QUOTAS Export and Import Sales Forecast Quotas from Digital Sales (Redwood UX)	Allows exporting and importing sales forecast quotas from Redwood UX.
ZSF_MANAGE_DIGITAL_SALES_FORECAST_QUOTAS Manage Sales Forecast Quotas from Digital Sales (Redwood UX)	Allows viewing and editing sales forecast quotas from Redwood UX. Note: This privilege isn't a requirement, but rather a recommendation to help show the best of the Sales Forecasting for Redwood UX capabilities.

Before you start using Sales Forecasting for Redwood UX, you must have the Manage Sales Forecast from Digital Sales (ZSF_MANAGE_DIGITAL_SALES_FORECAST) privilege and the View Sales Forecast from Digital Sales (ZSF_VIEW_DIGITAL_SALES_FORECAST) privilege.

Note: Oracle recommends that security administrators don't assign the required privileges to predefined roles directly to users. Instead, make a copy of a predefined role, remove the privileges that your users don't need, and assign users the role that contains only the privileges they need.

If you use custom job roles for your sales organization, you must manually associate the appropriate sales forecast rules to your custom job role access groups to set up sales forecast access for your salespeople, operations, and administrators. See *Secure Sales Forecasts Using Access Group Rules* for more information.

Related Topics

- [Where can I find resources about how to implement and use Forecasting in Oracle Sales in the Redwood User Experience?](#)

Where can I learn about Sales Forecasting BI Reports in the Sales Dashboard?

Sales managers can generate and view reports for themselves and for their team's forecasts and quotas for active periods by using subject areas in transactional Business Intelligence (BI).

Watch this video on Oracle Cloud Customer Connect for an overview of Sales Forecasting BI reports in the Sales Dashboard, using the subject areas available when forecasting by opportunity owner rolling up the resource hierarchy: *Configure the Sales Dashboard for Sales Reporting*.

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I change the default tab and sort order in the Appointments subview in Oracle Sales in the Redwood User Experience?

View the following video on Oracle Cloud Customer Connect to change which tab is visible in Oracle Sales in the Redwood User Experience by default in the Appointments subview, and how to sort the appointments by due date: *Appointments Subview Data Tab Customization*. The due date's an attribute that's hidden in the list.

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How do I enable an external application to use an Oracle Sales user account for integrations?

Watch this video on Oracle Cloud Customer Connect for an introduction to OAuth2 Resource Owner API authentication for Oracle Sales: *OAuth2 Resource Owner*.

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How do I obtain sales application user details for JavaScript action chains in Oracle Visual Builder Studio?

Watch the following video on Oracle Cloud Customer Connect to learn how to obtain user information for use in JavaScript action chains in Oracle Visual Builder Studio. You can use the information to personalize messages or to branch logic in your Oracle Sales in the Redwood User Experience application: *User Information*.

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How do I configure the Outlook add-in for Oracle Sales in the Redwood User Experience?

You can view a video to get an overview of setting up the Microsoft Azure integration, registering the add-in, adding users, configuring sync settings and viewing sync statuses, reviewing implementation best practices, and more.

See: [Configuring CX Sales Outlook Add-in](#) on Oracle Cloud Customer Connect.

For more information about the Outlook add-in for Oracle Sales in the Redwood User Experience, see the playbook, [How do I implement Microsoft 365 for Oracle Sales Redwood UX?](#) available on [Oracle Help Center > Sales > Playbooks page](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How does migrating to the Outlook add-in for Oracle Sales in the Redwood User Experience benefit me?

The Redwood UX add-in, known as the Oracle Sales for Outlook add-in, features task-oriented flows to simplify salespeople's daily sales activities. Optimized for Outlook, the intuitive UIs provide 360-degree sales information for meetings and emails, directly in the context of those meetings and emails. Salespeople can share meetings and emails with Sales. Emails are shared as conversation messages.

In addition, salespeople see a daily summary of appointments that they can act on. A default Workspace saved search can be set for each object across the organization and salespeople can set their preferred saved searches for sync using the add-in.

See this video on Oracle Cloud Customer Connect to view an introduction to the app: [CX Sales Add-in for Microsoft Outlook](#).

Related Topics

- [Implementing Redwood Sales videos on Oracle Cloud Customer Connect](#)

How can I change the status of my opportunity when the sales stage is changed?

There's no predefined mechanism in the application to automatically change the status of an opportunity when a sales stage is changed. 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.

However, you can create a Groovy script similar to the following to change the status of your opportunity based on a sales stage.

```
//Change the opportunity status based on sales stage (no matter what the sales stage is)

def stageId = null
def salesStageVO = null
def foundRows = null
def voRow = null
def salesStageStatus = null
def curOptyStatus = getAttribute('StatusCode')

stageId = getAttribute('SalesStageId')
salesStageVO = newView('SalesStageVO')
foundRows = salesStageVO.findByKey(key(stageId),1)
if (foundRows.size() == 1)
{
    voRow = foundRows[0]
    salesStageStatus = voRow.getAttribute('StageStatusCd')
}
if (salesStageStatus != null && curOptyStatus != salesStageStatus)
{
    setAttribute('StatusCode', salesStageStatus)
}
```

Related Topics

- [How do I create and change sales statuses for my opportunity?](#)

How do I change my Sales Competitors pages?

Competitor pages are available from the Navigator by selecting the **Competitors** menu item from your classic UI. You can use Application Composer to create and add custom fields and to change the look of the these pages.

Here are the pages and regions that you can extend using Application Composer for the Sales Competitor object, along with the navigation to the configuration pages.

Competitors Page	Competitors Region	Navigation
Competitors Overview page	Competitors list region	1. Select the Sales Competitor object. 2. Click the Pages link. 3. Click the Desktop Pages tab.

Competitors Page	Competitors Region	Navigation
		4. Click the Edit Summary Table link.
Create Competitor page	Details region	1. Select the Sales Competitor object. 2. Click the Pages link. 3. Click the Desktop Pages tab. 4. Click the Edit Creation Page link.
Edit Competitor page	Details region	1. Select the Sales Competitor object. 2. Click the Pages link. 3. Click the Desktop Pages tab. 4. Click the Edit Summary Form link.

Create Custom Fields for Your Sales Competitor Pages

1. Navigate to **Configuration > Application Composer**.
2. In the Objects tree, go to **Standard Objects**, expand the object tree for the object you want. For example, expand the **Sales Competitor** tree.
3. Click the **Fields** node for the object.
4. Click the **Custom** tab.
5. Click the **Create** icon, or select **Create** from the Actions menu.
6. Select the type of field you're creating. For example, select **Text** as the type for a text entry field.
7. Click **OK**.
8. In the Appearance area, enter a **Display Label** for the new field. Set other optional attributes as desired.
9. In the **Name** area, enter an internal name for the field. The application populates a name based on your entry in the **Display Label** field, but you can override the default value. Ensure there's no space in the internal name.
10. Optionally, in the **Constraints** area, enter other parameters for the field. For example, make the field a required field.
11. Optionally, in the **Default Value** region, enter a default value for the field.
12. Click **Save and Close**.

Add Custom Fields to Your Sales Competitor Pages

Now that you've created your custom fields, here's how add them to the Competitors pages or regions.

1. Navigate to **Configuration > Application Composer**.
2. In the Objects tree, go to **Standard Objects**, expand the **Sales Competitor** object tree.
3. Click the **Pages** node for the Sales Competitor object.
4. Click the **Desktop Pages** tab.
5. Click the page you want to change and make the changes.
6. Save your changes.

Duplicate Display Names for Fields

When you configure Competitors pages, in the **Available Fields** section of Application Composer, some field display names appear to be duplicates. For example, you might see two fields for Primary Competitor. The names you see in the list are display names only; each has an underlying name, which is its actual name. To see the underlying name of the field, hover your mouse pointer over the field name. The hover text displays the actual name of the field.

What name is displayed for a custom object with DCL fields in Workspace?

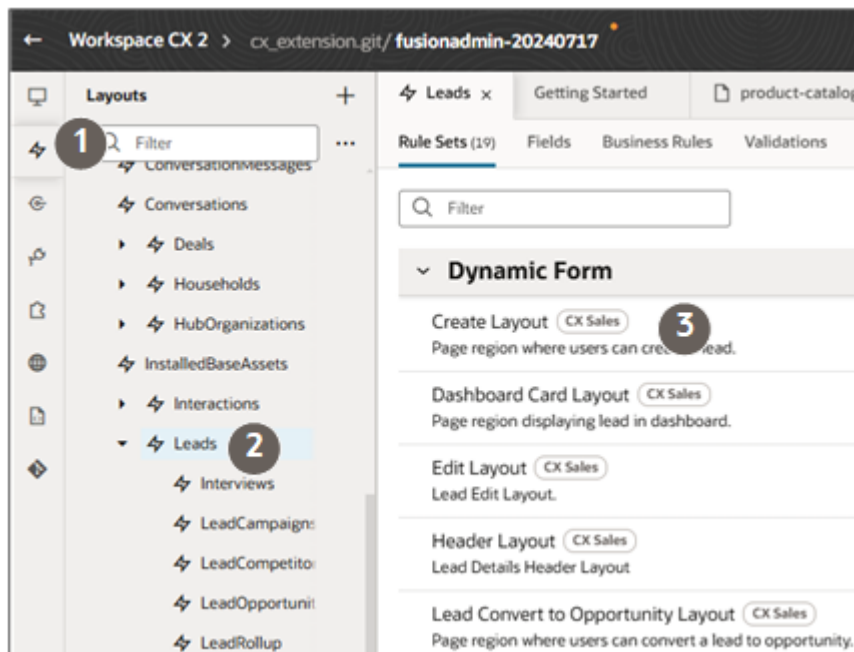
Workspace always displays the name of the custom object as the **Display Value** irrespective of what value is selected in the Dynamic Choice List (DCL) field for your custom object.

How can I display product fields in the Create Leads page or the Create Opportunity page in Oracle Sales in the Redwood User Experience?

You can display products and product group fields in the Create Leads or Create Opportunity pages by duplicating the Create Layout and adding the fields to your copy.

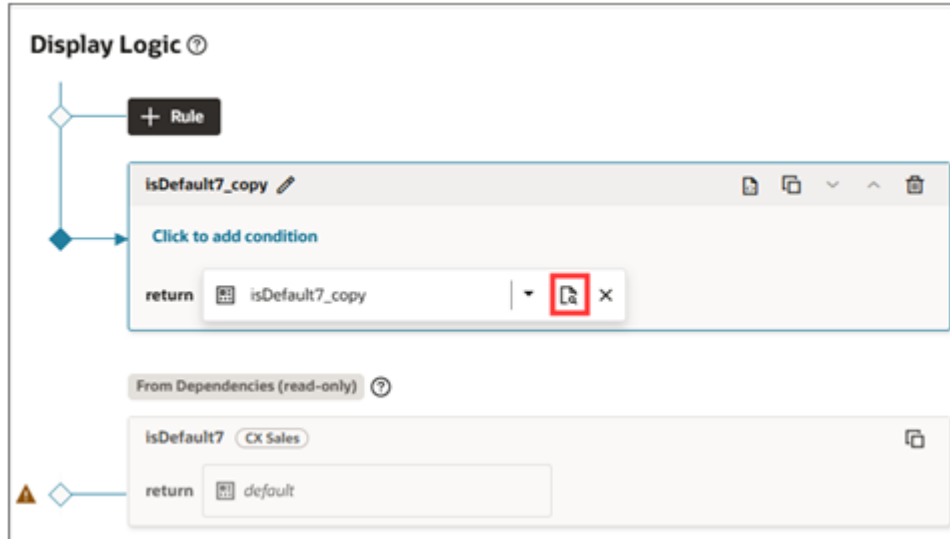
Here's how to add the product fields to the Create Leads page. The process is the same for the Create Opportunity page.

1. Open the Leads list page.
2. In the **Settings and Actions** menu, click **Edit Page in Visual Builder Studio**.
3. Click the **Layouts** tab (callout 1 in the screenshot)
4. Open the **Sales** node and click **Leads** (callout 2).
5. Under the **Dynamic Form** heading, click **Create Layout** (callout 3).

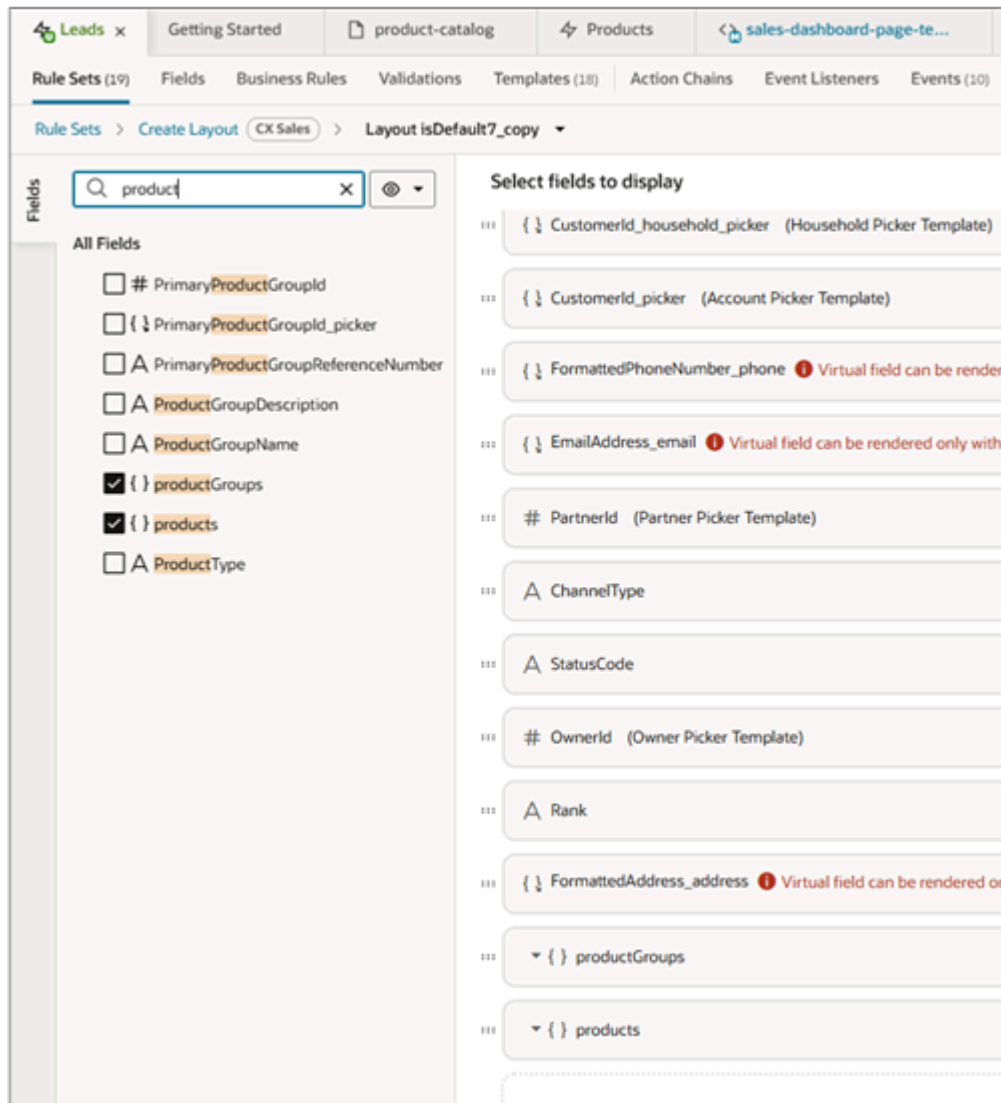


6. In the Display Logic section, click **Duplicate Rule** on the default layout to create your own layout.
7. In the Duplicate Rule dialog box:

- a. Optionally, enter a different name.
 - b. Leave the **Also create a copy of the layout** option selected.
 - c. Click **Duplicate**.
8. On your duplicate, click **Open** (the icon highlighted in the following screenshot)



9. On the Fields tab, search for **product**.



10. Select and drag the product field or the **productGroups** field to the desired location in the **Select fields to display** section.
11. Click **Preview** and create a lead to verify that the fields have been added to the page.

How do I remove the Create Product smart action from the Products list page in Oracle Sales in the Redwood User Experience?

You can remove the Create Product smart action by removing the Manage Products privilege from the user's job role. You can't remove the Create Product smart action in the Smart Actions configuration page.

How can I separate numbers with a comma as the decimal separator and a space as the thousands separator?

In Oracle Visual Builder Studio, you can use the final class `IntlNumberConverter` options to specify a comma or a period as the decimal separator. You must use a string function to a space as a separator. A space isn't a numeric value.

See the following section in the Oracle JET JavaScript Extension Toolkit documentation: [ConverterOptions](#).

How do we display data from a smart action object function on the Oracle Sales in the Redwood User Experience pages?

If you're displaying data from a web service, then call the object function by connecting it to a Service Data Provider (SDP) variable type. You can then use this variable in the UI code to reference the field values. You can't use a smart action object function for this because smart action object functions are headless actions, which can't be used to display data in the Redwood UI.

For more information on Service Data Provider see the topic: [Service Data Provider](#) and related content in the Developing Applications with Oracle Visual Builder guide.

How can I create Redwood pages for my custom sales object?

You can create Redwood pages for your custom Sales object by using the CX Extension Generator, available in Application Composer. With this tool, you can generate an application extension that includes panels, subviews, details pages, and smart actions. Once generated, you can download the extension as a single.zip file and upload it to Oracle Visual Builder Studio for further configuration.

For details, see the topic [Create a New Application Using the CX Extension Generator](#).

Can you drill down from Express Report charts in the Sales Dashboard?

Drill-down functionality is available on all Express Report charts within the Sales Dashboard in Oracle Sales in the Redwood User Experience. Clicking on a chart always displays the detailed list of records. To navigate to other reports, use the Visualization Configuration tool instead. This tool empowers you to enable drill-down to other reports within your visualizations.

Note: While you're creating express reports, the links are temporarily disabled to prevent you navigating away during the report configuration. You can drill down from express reports when you preview them.

How can I set up sales territories to assign sales accounts by business unit?

Accounts don't include Business Unit as a territory dimension, but you can set up an auxiliary dimension to do the assignment instead. Follow the steps described in the Oracle Support document [Configuring Auxiliary Dimension for Classic UI and Simplified UI \(Doc ID 2133998.1\)](#).

Where can I find information about integrating Microsoft Teams and Opportunities in the Redwood User Experience?

Oracle offers a sample solution that you can use to implement a collaboration solution integrated with Microsoft Teams that works consistently across Fusion applications. You can create a team in Microsoft Teams for Oracle Fusion business objects, such as opportunities for Oracle Sales, and view conversations within their sales application UI.

Here's where you find out how to setup the integration of Microsoft Teams and Opportunities:

1. Go to [Oracle Fusion Applications Downloads](#), and then click **Oracle Fusion Applications Social Network Integration**.
2. On the Oracle Software Delivery Cloud page, accept the license agreement, use the default Generic value in the Platforms attribute, then click **Download**.
3. Open the `oracle_ssn_dlm_09111833.exe` file that you just downloaded.
4. Follow the instructions in the Oracle Download Manager dialog, verify that the status says Complete, then click **Open Destination**. Download Manager takes you to the folder where you downloaded the file in Windows Explorer.
5. In Windows Explorer, use the 7-Zip File Manager to extract **V1044883-01.zip**.

6. Use the instructions in the **FusionApps_SocialIntegration_InstallGuide.pdf** that's in the compressed file to finish the installation.
7. Test: your installation
 - o Open an opportunity in Oracle Sales, then confirm that you can click **Microsoft Teams** and open the dialog.
 - o Click **Open Microsoft Teams** in the dialog, confirm that Teams opens and you can share the summary with other team members.
 - o Add some messages to your discussion in Teams.
 - o Go back to the opportunity in Oracle Sales, click **Refresh** on the dialog, then confirm that the dialog displays your messages.

See *End of Life (EOL) Details for Oracle Social Network- Fusion Applications Update 24C (Doc ID 2965583.1)* on My Oracle Support for more information about the retirement of Oracle Social Network (OSN).

Oracle provides different integration solutions with Microsoft Teams to cater for your specific sales application requirements.

For more information, see *Overview of Integrations with Microsoft Teams* in the How do I integrate Microsoft Teams with Redwood User Experience? solution playbook on the *Oracle Help Center Sales > Playbooks* page.

Why doesn't the My Team's Leads report showing the correct data to managers?

What lead data a manager sees in the My Team's Leads report depends on the sales resource hierarchy. Managers see only the data for leads owned by team members who are their subordinates. Check the hierarchy and make sure that you run the Reporting Hierarchy Generation scheduled process. For details on how to run the process, see the topic *How do I generate the resource reporting hierarchy?*.

How do I create an analysis that shows the number of leads and opportunities by business unit?

Use the **Sales- CRM Pipeline** subject area to create a report showing the number of leads and opportunities for each business unit. This subject area returns data on all opportunities and all leads and it also includes business unit attributes you need.

By contrast, the **Marketing-CRM Leads and Opportunities** subject area returns information only on leads that are converted and associated with opportunities. The Marketing-CRM Leads and Opportunities subject area also doesn't include business units.

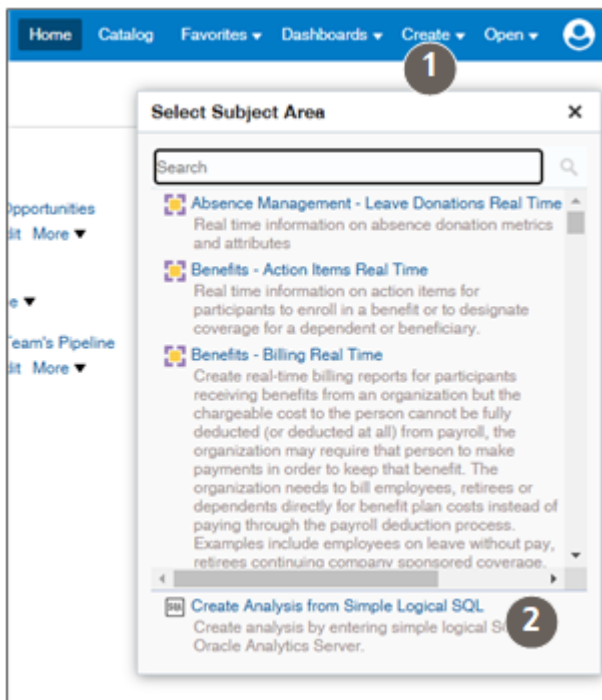
Here's a sample query using the **Sales- CRM Pipeline** subject area which displays the number of opportunities and leads for each business unit:

```
SET VARIABLE PREFERRED_CURRENCY='User Preferred Currency 1';SELECT  
  
"Sales - CRM Pipeline"."Business Unit"."Business Unit Name" s_1,
```

```
"Sales - CRM Pipeline"."Business Unit"."Manager Name" s_2,
DESCRIPTOR_IDOF("Sales - CRM Pipeline"."Business Unit"."Business Unit Name") s_3,
"Sales - CRM Pipeline"."Lead Facts"."# of Leads" s_4,
"Sales - CRM Pipeline"."Pipeline Facts"."# of Opportunities" s_5
FROM "Sales - CRM Pipeline"
```

You can create an analysis with this query on the Oracle Transactional Business Intelligence home page:

1. Click **Create > Analysis**.
2. In the Select Subject Area window, click **Create Analysis from Simple Logical SQL**.
3. Paste the query in the dialog box.



How can I turn off the Grammarly extension while loading an Oracle Intelligent Advisor interview?

You can turn off the Grammarly extension while loading an Oracle Intelligent Advisor interview using either of the two approaches:

- Turn off Grammarly for specific websites:

You can turn off Grammarly on websites hosting Oracle Intelligent Advisor interviews directly in the Grammarly settings, without any code. Visit this [Grammarly support article](#) for step-by-step instructions on disabling Grammarly for specific sites.

- Turn off Grammarly using data tags in the HTML:

For developers, you can turn off Grammarly on specific interview input by adding a data attribute to the HTML element. If you're working with Oracle Intelligent Advisor, this is typically done via JavaScript extensions. By adding the attribute `data-enable-grammarly="false"` to the relevant input fields, you can prevent Grammarly from showing its interface (for example, the green Grammarly button).

Here's an example JavaScript code that shows how to add this attribute using Oracle Intelligent Advisor JS Extensions:

```
OraclePolicyAutomation.AddExtension({
  customInput: function (control, interview) {
    if (control.getProperty("name") == "xMyExtension") {
      return {
        mount: function (el) {
          var myinput = document.createElement("textarea");
          myinput.cols = "80";
          myinput.rows = "10";
          myinput.maxLength = "5000";
          myinput.id = "customInput";
          myinput.value = control.getValue();
          myinput.setAttribute("data-enable-grammarly", false); // Disable Grammarly
          el.appendChild(myinput);
        },
        update: function (el) {
          var myinput = document.getElementById("customInput");

          // Check if the control is read-only to disable the text area
          if (control.isReadOnly()) {
            myinput.disabled = true; // Disable the text area if read-only
          } else {
            myinput.disabled = false; // Enable the text area if not read-only
          }
        },
        validate: function (el) {
          control.setValue(document.getElementById("customInput").value);
          return true;
        },
        unmount: function (el) {
          var customInput = document.getElementById("customInput");
          customInput.parentNode.removeChild(customInput);
        }
      };
    }
  }
});
```

Why can't I see the sales stages for newly created opportunities in my production environment?

You aren't seeing the sales stages in your production environment because any new opportunities created after you migrated records from your test environment to your production environments don't have any associated sales method.

To ensure that all your opportunity records in your production environment have a sales method, you can import only the following 3 fields for all your opportunities:

- OpportunityID

- SalesMethodID
- CurrSTGid

Here's how.

1. Do an export of all the Opportunities from the production environment.
2. From the export, only extract both the `salesMethodID` and `currSTGid` for those new opportunities created after you migrated the opportunity records from your test environment.
3. Once you've exported the details, you can now import the 3 fields to your production environment where the `salesMethodID` and `currSTGid` fields will have the same value for all the opportunity IDs `opportunityID` that you'll import back to production.

How do I assign an opportunity close date to a lead field using Groovy?

You can create a Before Update trigger on your Opportunity object to identify the associated lead or leads that you want to assign the opportunity close date and then insert the value of the field with whatever value you need.

You can use this sample Groovy script to help you get started.

```
def a = OpportunityLead
def f = ''
while (a.hasNext()){
    def d = a.next()
    f = f + ' - ' + d.LeadId
}
//throw new oracle.jbo.ValidationException('The lead ID is ' + f)
println('Leads - ' + f)

def vo = newView('Lead')
def vc = newViewCriteria(vo)
def vcr = vc.createRow()
def vci = vcr.ensureCriteriaItem('LeadId')
vci.setOperator('=')
vci.setValue(/*get the value from previously found leads*/)
vc.insertRow(vcr)
vo.appendViewCriteria(vc)
vo.setMaxFetchSize(500)
vo.executeQuery()
```

How come the email sent from a smart action shows it's sent from noreply@oracle.com?

To send email on behalf of the user, you must integrate Oracle Sales in the Redwood User Experience with Microsoft Exchange 365. When you complete the integration, the sent email shows up in both the user's sent items folder and is captured in Oracle Sales as well.

To learn how to set up the integration, see the [How do I implement Microsoft 365 for Oracle Sales Redwood UX?](#) guide.

What actions are available for contract requests with specific statuses?

The status of contract requests change according to predefined business rules. They're often triggered by specific events or actions performed on the contract request. You can set up your own approval rules and hierarchy in the Contract Request Approval Task in Business Process Manager (BPM).

For example, you can set up rules so that the status of the request changes from Draft to In Review status when the requester submits the request for approval. The request status transitions to Pending Approval and the approver will receive an email or Bell notification. Once the request is approved, the status becomes In Review and the request is assigned to the assignee. If the request is rejected, the status changes back to Draft.

When the status is set to Waiting for Information, a notification is sent to the requester.

The following table outlines the status of contract request and provides scenarios of when the status changes from one status to another:

Contract Request Status	Details	Scenario 1	Scenario 2
Draft	The requester is entering details.	If approval is set up: Clicking Submit for Approval changes the status to Pending Approval.	If approval isn't set up: Clicking Submit for Approval changes the status to In Review.
Pending Approval	The requester has submitted the request for approval.	Automatically set to In Review when the request is approved	Automatically set to Draft when the request is rejected
In Review	The request is with the Assignee for review.	Clicking Provide Information changes the status to Waiting for Information.	Clicking Create Contract changes the status to Pending Contract Activation.
Waiting for Information	The assignee is waiting for more information from the requester, so that the contract can be created.	Clicking Submit for Review changes the status to In Review.	NA
Pending Contract Activation	The contract is created automatically and it's not active.	Status of the request is set to Completed automatically when the status of the contract becomes Active.	NA
Completed	The contract is active.	Final status	NA

Why doesn't the supplier address display when I generate a contract?How to Set up Approval for Terms and Clauses

You must add the supplier address from the **Parties** tab on the **Edit Contract** page to display the supplier address when generating a contract.

Here's how to add the supplier address:

1. Open a contract.
2. Go to the **Parties** tab on the **Edit Contract** page and add the supplier's address.
3. Click **Save**.

Exit from the contract and return again to display the supplier address.

How do I set up approval rules for terms and clauses for contracts?

You can set up approval groups and approval task configuration rules for contract terms and clauses from the Setup and Maintenance work area.

1. From the Setup and Maintenance work area go to the following:
 - o Offerings: Sales
 - o Functional Area: Sales Foundation
 - o Task: Manage Approval Groups
2. On the Manage Approvals page, click the **Approval Groups** tab.
3. In the Groups region, select the plus sign icon to begin creating a new approval group.
 - a. Enter a name for the new group.
 - b. Click **Save**.
4. Add a member to the group. Click the **Add Member** icon to retrieve the Add to Group dialog window. In the search box, enter the email address of the member you want to include and click **OK**.
5. Click **Save**.
6. Repeat the previous steps to create an approval group that includes both level 1 and level 2 approvers.
7. Click the **Task Configuration** tab.
8. In the **Tasks to be configured** region, search for `ContractClauseApproval` and `TemplateApprovalHumanTask` for the set up of clause and template respectively.

9. Click the `ContractClauseApproval` Or `TemplateApprovalHumanTask` respectively to access a set of subtabs where you can set up rules for the approval task.
For example, from the Configuration region, you can set the assignment and routing policy attributes to suit your business needs. To allow the initiator add ad hoc approvers and configure notifications as the approval progresses, select the **Allow initiator to add participants option**.
10. You can create rules to suit your business needs. Edit the `ContractClauseApproval` Or `TemplateApprovalHumanTask` respectively.
11. Click **Rules**.
12. Expand each rule.
13. Click **Edit** to create rules for the `ContractClauseApproval` Or `TemplateApprovalHumanTask` stage rule set respectively.
14. Delete all three rules.
15. Create a new rule.
16. Enter the rule name. Click the arrow. From the **IF** label, click the list icon next to the first field.
17. As an example, in the Condition Browser, expand `ContractClauseApproval` Or `TemplateApprovalHumanTask`, `ContractDetails`, **result**, and create the following rule:
 Edit IF condition to 1 is 1

 Under Then block Choose
18. Select Approval Group from the List Builder drop-down list from the **THEN** label, and click **Create Action** to create the List builder action 1 region.
19. Select level 1 approver and enter the required information for the List builder action 1 region.
20. Or, to bypass the approval hierarchy and have automatic approval, create only the following rule.
 Edit IF condition to 1 is 1
 Under Then block Choose
 List builder : Supervisory Response type: Required Number of levels: 1 Starting
 Participant `HierarchyBuilder.getPrincipal(Task.creator,-1,"","")` Top Participant
`HierarchyBuilder.getPrincipal(Task.creator,-1,"","")`
 Auto action enabled: True Auto Action: "APPROVE"
 Save and commit.
21. Click the **Approval Group** tab to create an approval group for Clause and Template Approval respectively.
22. Click the **Task Configuration** tab to create rules for clause approval human task and template approval human task respectively. Click the human task `TemplateApprovalHumanTask` Or `ContractClauseApproval` and then click the **Rules** subtab.
23. Click the **Approval Group** tab to create an approval group for Template Approval or Clause Approval.

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:
 - o Offering: Sales
 - o 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.

Which verification service is supported in Oracle Fusion for Address, Email, and Phone Verification?

The Oracle Address, Email, and Phone Verification is provided by Loqate.

Why can't I edit addresses in parties?

Addresses in parties can't be edited after they are verified or cleansed. You can enable editing these addresses using after updating the HZ_UPDATE_STD_ADDRESS profile option.

Update the profile value of this profile option by:

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

What happens if I add or update the details of a country?

Any change in the country details is reflected in pages associated with geographies such as Manage Territories, addresses list of values in the Account and Contact UI, and so on. However, the list of countries in the Manage Geographies isn't updated.

Can I remove the owner of a contact?

You can't remove the owner of the contact, but you can change them. If the OwnerPartyID, OwnerPartyNumber, or OwnerEmailAddress is provided it can be changed but not removed.

The owner is assigned by default to the logged in user.

Can I assign different resource roles in different organizations to a resource?

No, a single resource can't be active in multiple resource organizations as a resource can have only one active resource organization membership at any given point in time.

How do I translate custom address elements using Manage Address Formats task?

The User Interface Text (UIT) translation only applies to predefined elements in address and not custom elements. You can use Manage Address Formats task to translate the custom address elements which aren't covered by the UIT.

For example, here are the steps to edit address labels in Arabic through Manage Address Formats task.

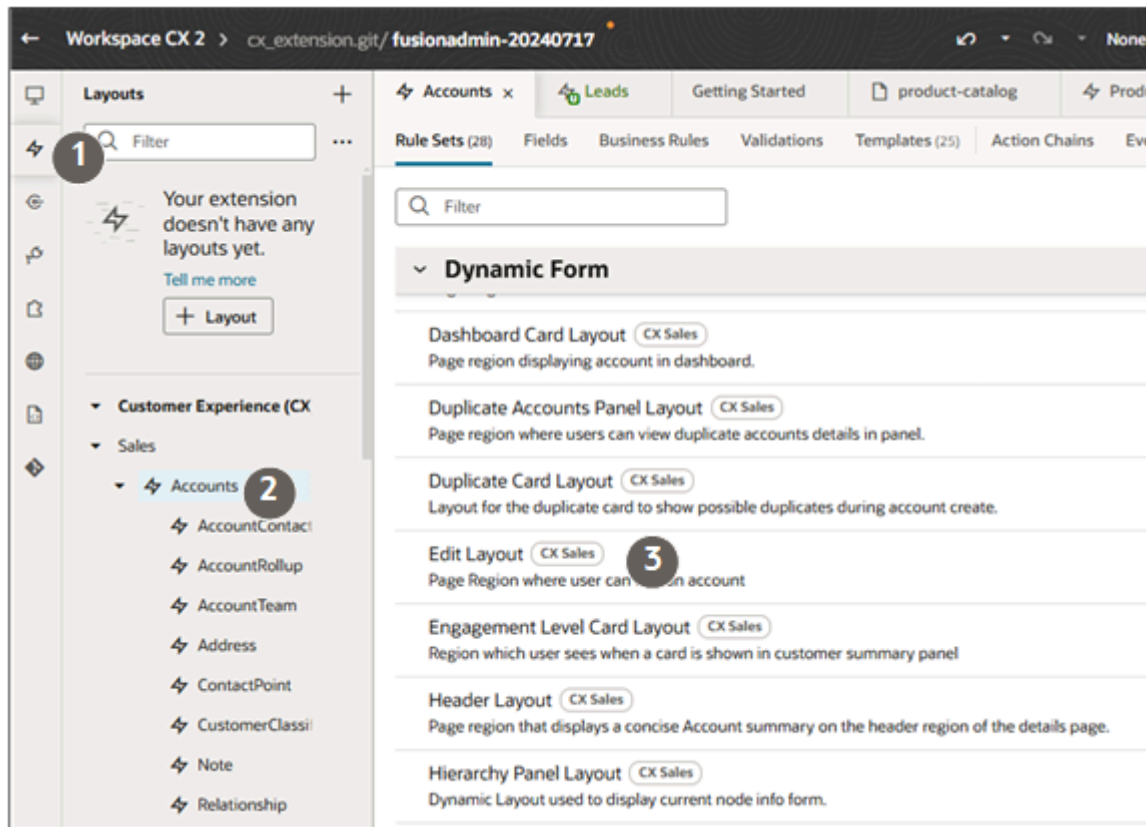
1. Change the session to Arabic
2. Go to **Setup and Maintenance** and search for Manage address formats.
3. In the **Manage Address Formats** page, search for the code, POSTAL_ADDR_SA.
4. Under **Search Results**, click **Saudi Arabia Postal Address Format**.
5. On the **Address Style Format: Saudi Arabia Postal Address Format** page, click **Edit**.
6. Change **Prompt** column for each attribute that you want to update in Arabic.
7. Click **Save and Close**.

How do I add a field to the Edit pages in Oracle Sales in the Redwood User Experience?

Use Oracle Visual Builder Studio to add fields to the Edit Account and other edit pages in Oracle Sales in the Redwood User Experience. Here's how.

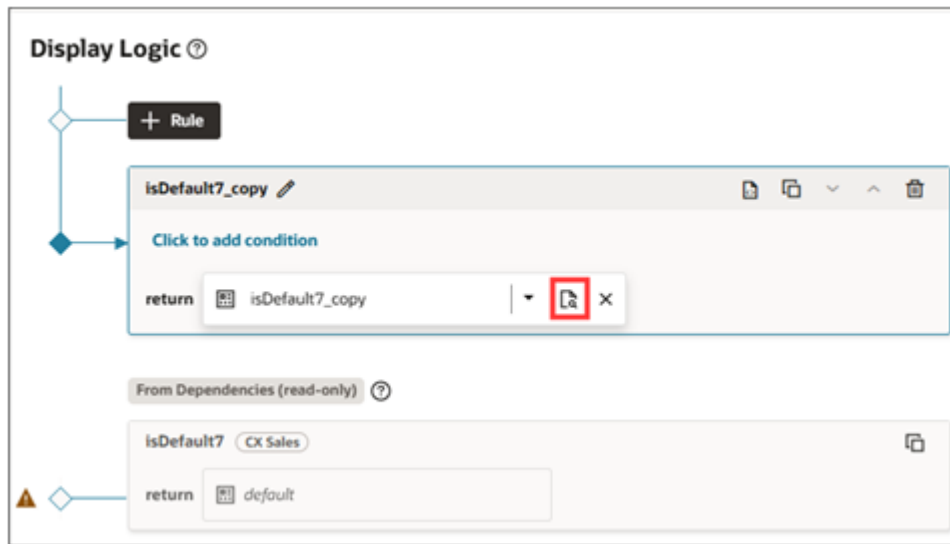
1. Open the Account list page (or the list page of another sales object).
2. Drill down into a record and click the **Details** button to open the edit page.
3. In the **Settings and Actions** menu, click **Edit Page in Visual Builder Studio**.
4. Click the **Layouts** tab (callout 1 in the screenshot)
5. Open the **Sales** node and click **Accounts** or another object (callout 2).

6. Under the **Dynamic Form** heading, click **Edit Layout** or another layout where you want to add the field (callout 3).

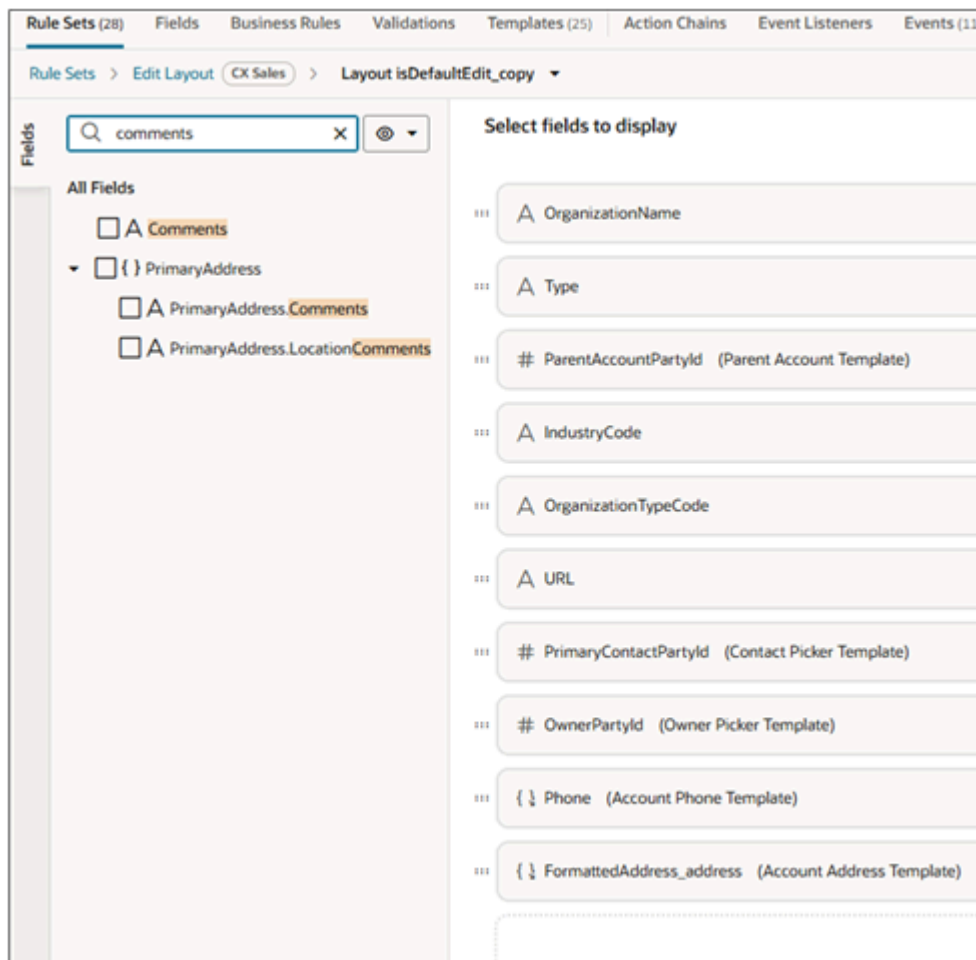


7. In the Display Logic section, click **Duplicate Rule** on the default layout to create your own layout.
8. In the Duplicate Rule dialog box:
 - a. Optionally, enter a different name.
 - b. Leave the **Also create a copy of the layout** option selected.
 - c. Click **Duplicate**.

9. On your duplicate, click **Open** (the icon highlighted in the following screenshot)



10. On the Fields tab, search for the name of the field you want to insert, for example, **comments**.



11. Select and drag the field to the desired location in the **Select fields to display** section.

12. Click **Preview** at the top of the page to view the field you added on the page.

How does Sort by Relevance sort the results of a search?

A search by keyword in Oracle Sales in the Redwood User Experience displays results sorted by relevance: the records with the highest number of hits are listed first. For example, searching accounts on the term "Redwood", lists accounts with "Redwood" in the name and addresses in Redwood City before listing accounts with "Redwood" in the account name only.

You can sort the results using other attributes, such as the date or name, using the controls at the top of each column. To restore the original order, click **Actions > Sort by Relevance**.

How do I delete a record and its child entities using REST API?

You can delete a record and its child entities by using REST API and Schedule process.

Delete a record and its child entities

You can delete a record by setting the parent record to Inactive status. Use the Delete Child Entities of Inactive Party Records schedule process to delete all associated child entities of inactive parent records.

Here's how you can do it:

1. Delete the parent record
2. Use Delete Child Entities of Inactive Party Records schedule process

Delete parent record

To delete a record such as account, contact, household, hub person or hub organization, you need to set the status of the record to "Inactive". You can change the status of an account with the Delete action.

cURL Command

```
curl
-u <username:password> \ -X DELETE
https://servername.fa.us2.oraclecloud.com/crmRestApi/resources/11.13.18.05/accounts/CDRM_262783
```

Delete child entities of inactive party records

When you delete parent record like account, contact, household, hub person or hub organization from the UI pages, web services, or file import, all child entities like contact points, relationships, address, source system references, and so on aren't deleted automatically.

You can use the *Delete Child Entities of Inactive Party Records* scheduled process to delete all associated child entities of inactive party records. Once deleted, it's recommended that you *Purge Inactive Data*. Purging inactive records helps helps you free space and comply with data protection regulations.

Retain child entities of inactive parent records

If you want to retain the child entities, then you must move the child entities to a different parent record before inactivating the parent record. Here's how you can do that:

1. Create a resolution request using REST API
2. Run Request Dispatch Job

Create a resolution request using REST API

To move the child entities to a different parent record you can create a resolution request by referencing the details of the duplicate parties that you wish to resolve. Depending on the details, you can create a request payload by,

- Using the Party Number
- Using the Party ID and Specifying the Master Record
- Using the Source System Reference

Note: When you create a Resolution Request, a duplicate resolution work item is also created which is processed by the Oracle Fusion Data Quality system.

Here's an example of how you can create a resolution request using the party number:

cURL Command

```
curl -u <username:password> \ -X POST -d  
@example_request_payload.json  
https://servername.fa.us2.oraclecloud.com/crmRestApi/resources/11.13.18.05/resolutionRequests
```

Example of Request Body

The following example shows the contents of the request body in JSON format.

```
{  
  "RequestName": "API Merge Request 001",  
  "ResolutionType": "MERGE",  
  "DuplicateParty": [  
    {"PartyNumber": "CDRM_3102" },  
    {"PartyNumber": "CDRM_3109" }  
  ]  
}
```

Example of Response Body

The following example shows the contents of the response body in JSON format.

```
{  
  "RequestId" : 300100177252448,  
  "RequestNumber" : "300100177252448",  
  "RequestName" : "API Merge Request 001",  
  "ResolutionStatus" : "PENDING",  
  "ResolutionStatusMessage" : null,  
}
```

```
"ResolutionType" : "MERGE",
"CreationDate" : "2019-05-02T09:14:10+00:00",
"CreatedBy" : "MDM_ADMIN_V1",
"LastUpdateDate" : "2019-05-02T09:14:10.321+00:00",
"LastUpdatedBy" : "MDM_ADMIN_V1",
"DuplicateParty" : [ {
  "PartyId" : 300100011634984,
  "PartyType" : "ORGANIZATION",
  "PartyNumber" : "CDRM_3102",
  "PartyName" : "Pinnacle Corporation",
  "MasterFlag" : true,
  "SourceSystem" : null,
  "SourceSystemReferenceValue" : null,
  "links" :
}, {
  "PartyId" : 300100011635048,
  "PartyType" : "ORGANIZATION",
  "PartyNumber" : "CDRM_3109",
  "PartyName" : "Firesite Wallover",
  "MasterFlag" : false,
  "SourceSystem" : null,
  "SourceSystemReferenceValue" : null,
  "links" : ...
} ],
"links" : ...
}
```

For more information see [Create a resolution request](#).

Run Request Dispatch Job

The Request Dispatch job is used to process duplicate resolution requests that are in Pending or Submitted status. See [Run Request Dispatch Jobs](#) for more details.

How can I identify foreign key fields and related objects with the REST API metadata?

A fixed choice list (FCL) is a field that contains a list of static values populated from an FND lookup type. The field's specific list values are populated from a lookup type that you select when you define the field.

Dynamic choice lists (DCL) are the fields that show you several values to select from. You select the most relevant one for your task. It's populated from an existing object's actual data, which you can add filters to. Based on how you define the field, the list is dynamically populated at runtime and its values can change depending on the user's context.

You can identify if the field is an FCL by looking at `lov.attributeMap.source`. If the value is `LookupCode`, then it's an FCL; otherwise, it would be DCL.

Or, you can also use the `lovResourcePath` element in the LOV to construct a URL that will give you all the LOV values for the target. You can then use the **resource element** and **filter element** to construct the API to get the list of lookup codes.

Sample URL

```
{{server_url}}/{resource element}/{filter}
```

Below is an example of the LOV element:

```
"lov" : {  
  "childRef" : "YesNoLOV",  
  "attributeMap" : [ {  
    "source" : "LookupCode",  
    "target" : "BudgetedFlag"  
  } ],  
  "displayAttributes" : [ "Meaning" ],  
  "lovResourcePath" : [ {  
    "resource" : "fndStaticLookups",  
    "filter" : "?finder=LookupTypeFinder%3BBindLookupType%3DYES_NO"  
  } ]  
}
```

Example of URL

```
{{server_url}}/fndStaticLookups?finder=LookupTypeFinder%3BBindLookupType%3DYES_NO
```

This will give you all the LOV values that apply to the target which is BudgetedFlag in this case.

For more information see [What are dynamic choice lists?](#) and [What's the difference between fixed choice lists and dynamic choice lists?](#)

How do I connect to a sandbox through REST API?

You can connect to a specific sandbox through REST API calls by connecting to the Sandbox environment or using the Metadata-Context key respectively. Here's how you can do it using UI and POSTMAN.

UI

1. Sign in to the Sandbox environment using your account credentials.
2. Call the REST API using your account

When you're in the sandbox environment, the response will include custom objects and attributes defined in that sandbox.

POSTMAN

You can connect to a specific sandbox when calling a REST API by specifying the following headers:

- Key = Metadata-Context
- Value = sandbox="SandboxName"

Example 1

In this scenario, you've an unpublished new custom object named CO1 in Sandbox1. When you call a REST API to get or update on the CO1 object, you'll get the correct response.

Note: You can call only the custom resources that are specific to that Sandbox environment. For example, if you call the CO1 API outside any sandbox or while in any other sandbox such as Sandbox2 then you'll get an error 404.

Example 2

In this scenario, you've already published a custom object named CO2. Also, in Sandbox1 you've added a custom attribute named Attribute1 to CO2. When you call the CO2 REST API while in Sandbox1, your REST output will include Attribute 1.

Note: If you call the CO2 REST API while outside the sandbox or in any other sandbox, your REST output will not include the Attribute 1 field. Although it will include all the fields in the mainline. Here, you can't update Attribute 1 in CO2 as well.

How do I clear a field and set it to NULL or empty?

While uploading a CSV add value #NULL in the field that you want to keep empty.

For more information see [Understanding Import and Export Management for for Sales and Fusion Service](#)

Why is my export job failing?

Your export job may fail if it includes a field with display name length greater than 120 characters.

The object must not include any field with display name length greater than 120 characters. For more information see [How do I export data?](#)

How can I restore a deleted customer account?

You can't restore a customer account with a status I (Inactive).

However, you can export inactive and merged accounts, contacts, households, organizations, and persons using export management. You don't need to rely on data model queries to fetch the deleted or merged records.

To export inactive records, you need to explicitly add the condition to the criteria, or else only the active records will be exported. For example, I for Inactive and M for merged.

All associated child records (active or inactive) will be exported irrespective of their status, if no criteria is added.

For more information see [How you manage export objects?](#)

Can I undo a lead conversion after it's converted to an opportunity?

No, you can't revert or undo a lead conversion to its initial state after its converted to an opportunity. However, as a workaround, you can manually perform a few tasks to revert your action.

You can either delete or change the status of the opportunity to **Lost** and then create a new lead. Once the new lead is created, you can then either set the status of the initial lead to **Retired** or delete the lead from your sales application.

How can I broaden my account searches to include all addresses in Workspace?

By default, Workspace makes it possible for you to use the fields in the primary address in searching accounts using the Search box. If your accounts have multiple addresses, you can broaden the search to include all the addresses. To search on a particular attribute in Workspace, you must select the **Include in Keyword Search** option for that attribute.

To broaden account searches to include all addresses for searching accounts:

1. Navigate to the Setup and Maintenance work area, and use the following:
 - o Offering: Sales
 - o Functional Area: Sales Foundation
 - o Task: Configure Adaptive Search

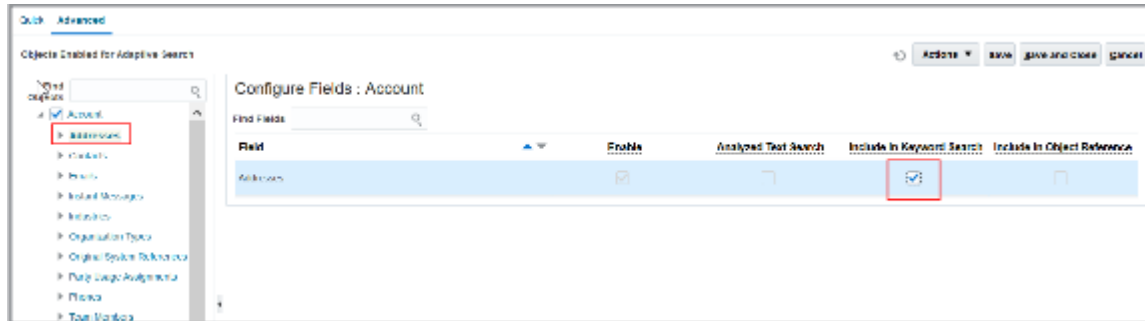
The Configure Adaptive Search page appears.

2. Click **Advanced**.
3. In the left pane of the tab, open the Account object to reveal its related objects.
4. Select the **Addresses** related object.

The right pane, Configure Fields: Account displays the concatenated Addresses field.

5. Make sure the **Enable** option is selected for the Addresses field.
6. Select the **Include in Keyword Search** option.

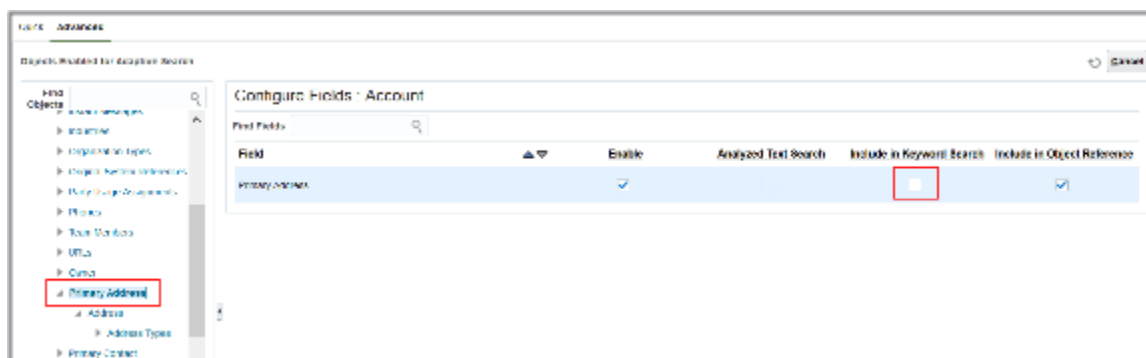
Here's a screen capture of the Advanced tab of the Configure Adaptive Search page highlighting the selection of the Account Addresses in the left pane and the Addresses field with the selected **Include in Keyword Search** option in the right pane.



7. Now that all addresses are included in account searches, you can exclude the primary addresses to avoid duplication. Primary addresses are already included in addresses.

- a. Select **Primary Address** in the left pane.
- b. Deselect the **Include in Keyword Search** option in the right pane.

Here's a screen capture of the Advanced tab of the Configure Adaptive Search page highlighting the selection of the Primary Address in the left pane and the Primary Address field with the **Include in Keyword Search** option deselected in the right pane.



8. After making your selections, click **Publish**.

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

Related Topics

- How can I enable multiple addresses for accounts?

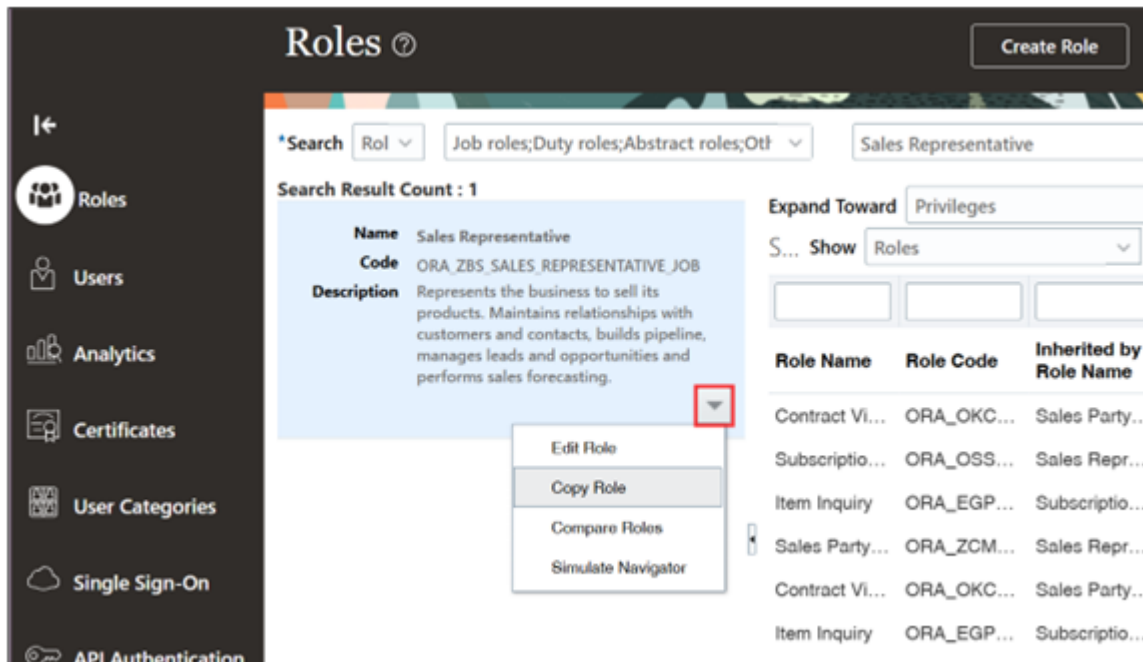
How do I remove the Create Account button and action on the list page in Oracle Sales in the Redwood User Experience?

You can remove the Create Account button and action for a sales representative by removing the Create Sales Organization functional privilege from the assigned job role. To do this, you must copy and edit roles in the Security Console. You can't remove the button or action using Oracle Visual Builder Studio.

Here's how to remove the button and action:

1. While signed in as a setup user, open the Security Console (**Navigator > Tools > Security Console**).

2. Make a deep copy of the Sales Representative job role provided by Oracle and add the user to the copy:
 - a. On the Roles tab, search for and select the Sales Representative job role provided by Oracle (ORA_ZBS_SALES_REPRESENTATIVE_JOB)
 - b. From the **Actions** menu in the left pane, select **Copy Role**.

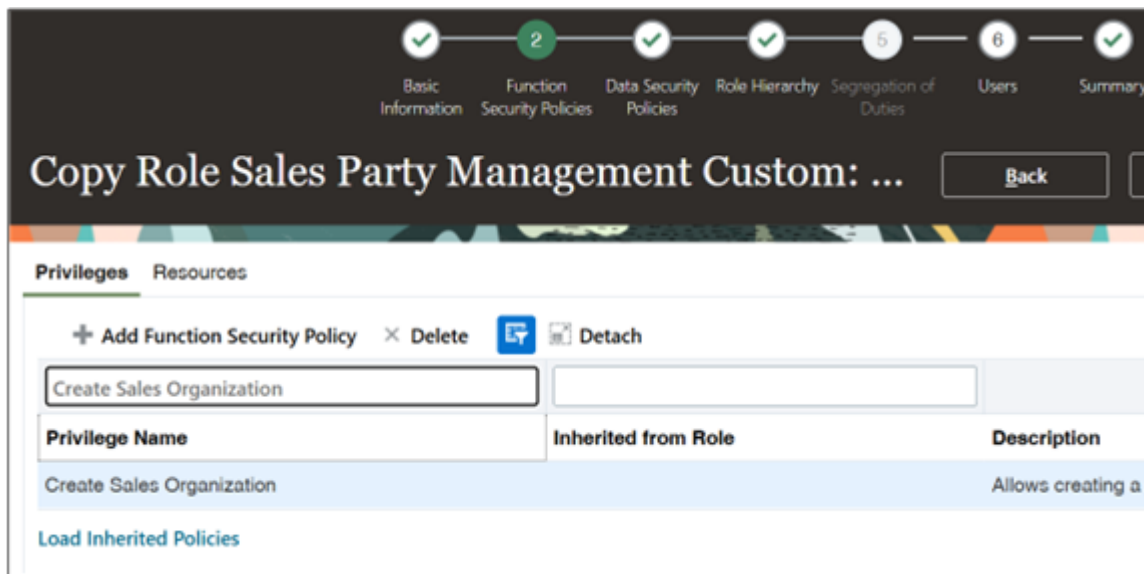


- c. In the Copy Options dialog box, select **Copy top role** to make a shallow copy, and click **Copy Role**.
- d. In the Copy Sales Representative Custom page, click step 6, **Users**.



- e. Add the user.
- f. In the Summary step 7, click **Submit and Close**.
- g. Wait until the generation process completes. You can check on the progress on the **Administration > Role Status** tab.

3. Make a deep copy of the Sales Party Management Duty role, and delete the Create Sales Organization functional privilege from the copy:
 - a. On the Roles tab, search for and select the Sales Party Management Duty (ORA_ZCM_SALES_PARTY_MANAGEMENT_DUTY).
 - b. From the **Actions** menu in the left pane, select **Copy Role**.
 - c. In the Copy Options dialog box, select **Copy top role and inherited roles**.
 - d. In the Functional Security Policies step 2, search for the Create Sales Organization functional privilege and delete it.



- e. In the Summary step 7, click **Submit and Close**.
 - f. Wait until the generation process completes. You can check on the progress on the **Administration > Role Status** tab.
4. In the copy of the Sales Representative job role you made, substitute the copied Sales Party Management Duty role for the one provided by Oracle. (Oracle role codes start with ORA. Custom roles don't.)
 - a. On the Roles tab, search for and select the Sales Representative custom job role.
 - b. From the **Actions** menu in the left pane, select **Edit Role**.
 - c. In the Role Hierarchy step 4, search for and delete the Sales Party Management Duty (ORA_ZCM_SALES_PARTY_MANAGEMENT_DUTY).
 - d. Add the Sales Party Management custom duty role you created.
 - e. In the Summary step 7, click **Submit and Close**.

How do I turn off and remove Global Search in the Classic UI?

You can remove the Global Search box in the Classic UI, by setting the profile option **Global Search Enabled** (FUSION_APPS_SEARCH_ENABLED) to **N** using the **Manage Administrator Profile Values** task in Setup and Maintenance. Using this profile option, you can turn off Global Search and remove the search box for everyone or for individual users.

Which roles can access Trading Community Person Lookup and Contact Lookup?

An administrator role can access Trading Community Person Lookup and Contact Lookup.

Here are some roles which can access these lookups:

- Sales Administrator (ORA_ZBS_SALES_ADMINISTRATOR_JOB)
- Customer Relationship Management Application Administrator (ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB)
- Application Implementation Consultant (ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB)

Is account enrichment available in Oracle Sales in the Redwood User Experience?

Use Oracle Customer Data Management to clean, consolidate, and enrich customer information, and create a trusted master list accounts and contacts.

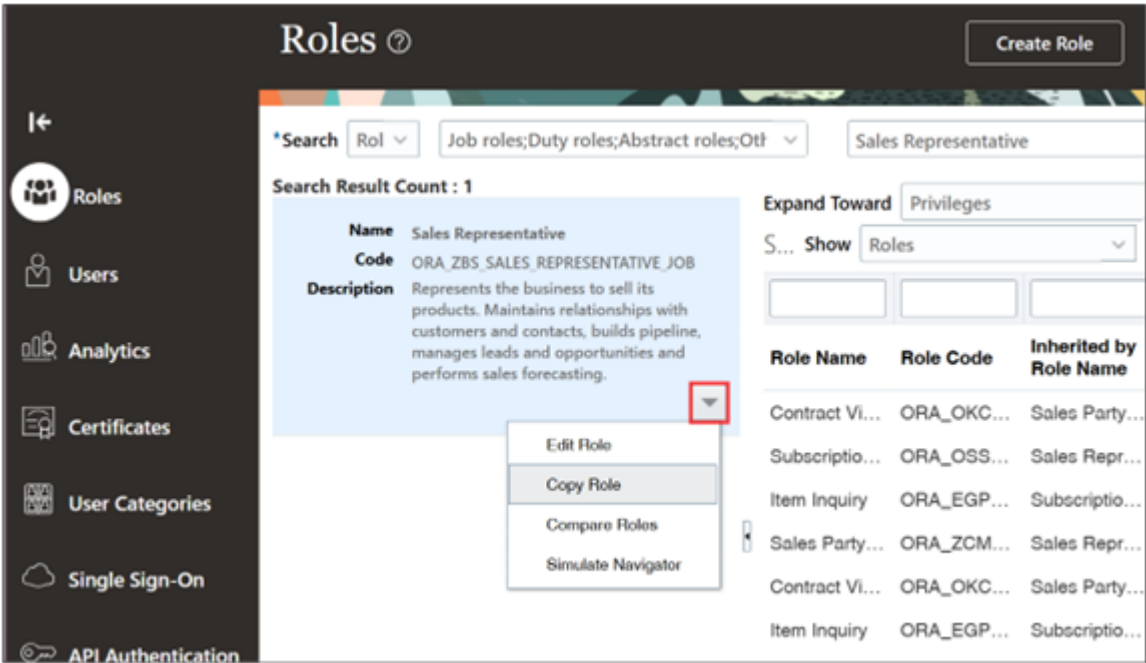
There is no specific page for enrichment in Oracle Sales in the Redwood User Experience but you can view accounts or contacts pages in Oracle Sales.

How do I remove the Create Lead button and task from the list page in Oracle Sales in the Redwood User Experience?

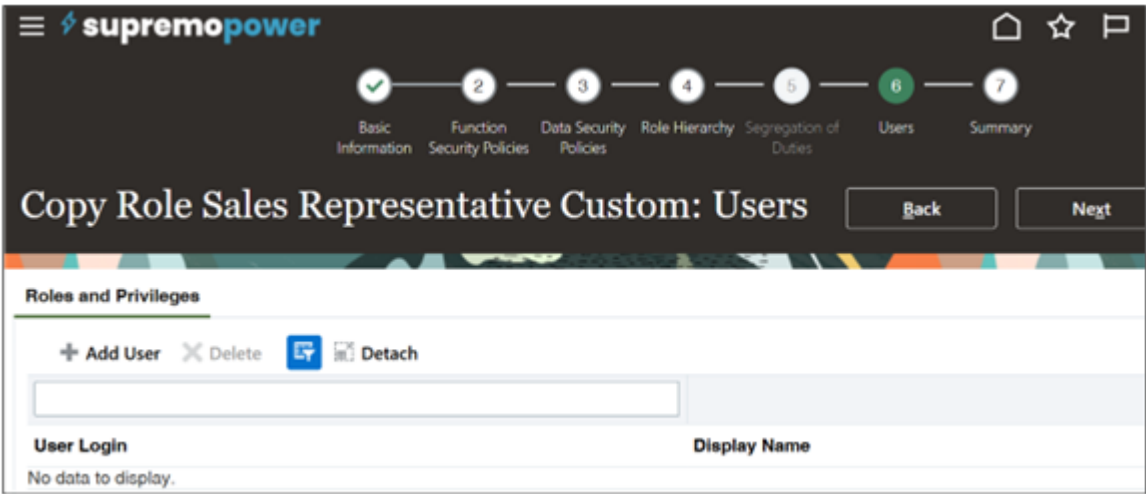
You can remove the Create Lead button and task for a sales representative by removing the Create Sales Lead privilege from the assigned job role. To do this, you must copy and edit roles in the Security Console. You can't remove the button or task using Oracle Visual Builder Studio.

Here's how to remove the button and task:

1. While signed in as a setup user, open the Security Console (**Navigator > Tools > Security Console**).
2. Make a deep copy of the Sales Representative job role provided by Oracle and add the user to the copy:
 - a. On the Roles tab, search for and select the Sales Representative job role provided by Oracle (ORA_ZBS_SALES_REPRESENTATIVE_JOB).
 - b. From the **Actions** menu in the left pane, select **Copy Role**.

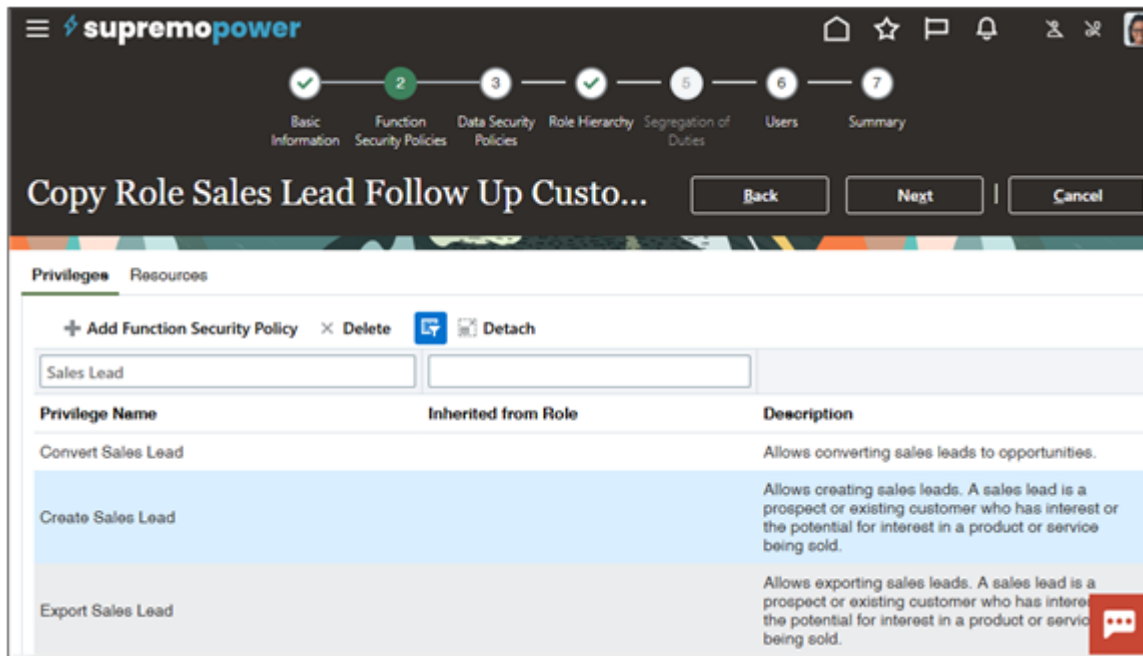


- c. In the Copy Options dialog box, select **Copy top role** to make a shallow copy, and click **Copy Role**.
- d. In the Copy Sales Representative Custom page, click step 6, **Users**.



- e. Add the user.
- f. In the Summary step 7, click **Submit and Close**.
- g. Wait until the generation process completes. You can check on the progress on the **Administration > Role Status** tab.

3. Make a deep copy of the Sales Lead Follow Up Duty role, and delete the Create Sales Lead functional privilege from the copy:
 - a. On the Roles tab, search for and select the Sales Lead Follow Up Duty (ORA_MKL_SALES_LEAD_FOLLOW_UP_DUTY).
 - b. From the **Actions** menu in the left pane, select **Copy Role**.
 - c. In the Copy Options dialog box, select **Copy top role and inherited roles**.
 - d. In the Functional Security Policies step 2, search for the **Create Sales Lead** (MKL_CREATE_SALES_LEAD_PRIV) functional privilege and delete it.



- e. In the Summary step 7, click **Submit and Close**.
 - f. Wait until the generation process completes. You can check on the progress on the **Administration > Role Status** tab.
4. In the copy of the Sales Representative job role you made, substitute the custom Sales Lead Follow Up Duty role you just created for the one provided by Oracle. (Oracle role codes start with ORA. Custom roles don't.)
 - a. On the Roles tab, search for and select the Sales Representative custom job role.
 - b. From the **Actions** menu in the left pane, select **Edit Role**.
 - c. In the Role Hierarchy step 4, search for and delete the Sales Lead Follow Up Duty (ORA_MKL_SALES_LEAD_FOLLOW_UP_DUTY).
 - d. Add the custom Sales Lead Follow Up Duty duty role you created.
 - e. In the Summary step 7, click **Submit and Close**.

Is there any ready to use method for partner to view its child accounts?

No, as a partner user, you can only access information within your own partner account. You can't view other partners' data.

The Channel Manager role has access to view and manage multiple partners.

Can I use a ready to use feature to make a partner company the parent of another partner company?

Yes, currently, a ready to use parent-child relationship and partner hierarchy is supported. You can make one partner company the parent of another partner company.

You can assign a parent account to a partner through the partner's details page.

How do I display a badge on Partner Overview page?

You can create a tier to display a badge on Partner Overview page. Here are the steps:

1. Sign in with your channel manager credentials
2. On to the dashboard, go to **Partner Management** > **Programs** Programs.
3. Click the Tiers tab.
4. On the **Tiers** page, click **Add**.
5. Provide a name for the tier.
6. Select a badge for the tier. The badge is an icon used to quickly identify the tier.
7. Click **Save**.
8. To create more tiers, click **Add**. If you've multiple tiers, you can use the ordering arrows, to move tiers up or down.
9. Click **Save**.

Related Topics

- [Manage Partner Programs for Channel Managers](#)

Can I enable Enrich Account button in Redwood Sales?

No, in Redwood Sales, for existing sales accounts, there's currently no option to request enrichment. Instead, you can use the batch enrichment process for the enrichment of existing sales accounts.

How do I get the department details from the user profile of the opportunity owner using Groovy?

You can create a Before Update trigger on your Opportunity object to retrieve the department details from the user profile of the opportunity owner using Groovy.

You can use this sample Groovy script to help you get started.

```
def ownerpartyId = <<Fetch the partyId of the Owner Resource ">
def vo = newView('Resource');
def vc = vo.createViewCriteria();
def vcr = vc.createRow();
def vcil = vcr.ensureCriteriaItem('PartyId');
vcil.setOperator('=');
vcil.setValue(ownerpartyId);
vc.insertRow(vcr);
vo.appendViewCriteria(vc);
vo.executeQuery();
def ownerdept = "";
if (vo.hasNext()) {
    def res = vo.next();
    ownerdept = res?.DeptMeaning.toString();
}
return ownerdept
```

How do I add a field to my Opportunity page in the Redwood User Experience using Oracle Visual Builder Studio?

View the following video on Oracle Cloud Customer Connect to learn how to add a field to your opportunity pages from the Redwood Sales video series using Oracle Visual Builder Studio: [Adding a Field to a Form and Changing the Default Rendering](#).

How can I hide a field on the Details page, but keep the field updatable using the Action Bar?

You can hide a field by creating and applying an empty field template to it. For example, you might want to hide the Win Probability field from the opportunity Details page because Win Probability is already displayed in the page header. Salespeople can update the Win Probability using the Update action in the Action Bar.

Here's how to create and apply an empty field template:

1. Navigate to the edit rule set for the object.
 2. Copy the default layout.
 3. Add fields to the copied layout of the rule set.
 4. Click the field you're hiding.
 5. Click **Create a Template** in the Properties pane.
 6. Provide the template name, ID, and description.
 7. Open the template to the code view.
 8. Remove the lines of code within the template except for the template ID details.
- ```
<template id="<name-of-hidden-field">
 <oj-input-text value="{{ $value }}" label-hint="[[$labelHint]]"></oj-input-text>
</template>
```

## How do I get imported activities to show up in the activity stream in each record?

Activities you import don't automatically show up in the list of activities. You can display them by making an update after import.

For example, you can update the field as follows:

1. Add a custom field to the import with a value of "Imported".
2. Create a routine to change the value of the field in the imported records to "Updated by Routines".

## How do I set the parent of an account using Groovy in Oracle Sales in the Redwood User Experience?

Here's sample Groovy to set the parent of an account.

- Object : Account
- Trigger : Before Update

```
if(ParentAccount_Id_c != null)
```



```
{

 def newParent = ParentParty

 def row = newParent.createRow()

 row.setAttribute('PartyId',ParentAccount_Id_c)

 newParent.insertRow(row)

}
```

## How do timeouts work in Oracle Sales in the Redwood User Experience?

Timeouts are designed to ensure business data protection and security. Your sign in is valid for 8 hours, for example. You also get signed out after 30 minutes without any application or browser activity.

For more information, see [Understanding Timeouts in Oracle Application Clouds](#).

## What happens to the conversion rate when an open or closed opportunity is changed?

When an open opportunity is updated, its conversion rate to the corporate currency is updated to the opportunity currency's rate on the current date. When a closed opportunity is updated, its conversion rate is updated to the rate on the opportunity's actual close date.

### Related Topics

- [How do I enable multiple currencies in Sales?](#)
- [How do I allow salespeople select a different currency in Opportunities and Leads?](#)

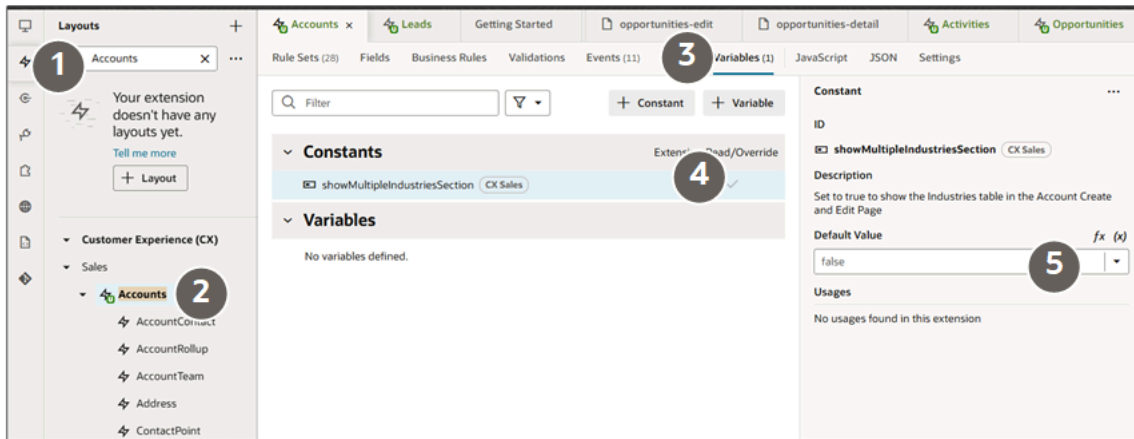
## How can I display multiple industries for an account in Oracle Sales in the Redwood User Experience?

You can display multiple industry values for accounts by setting the Boolean constant showMultipleIndustriesSection to True for account layouts in Oracle Visual Builder Studio (**Layouts > Sales > Accounts > Variables**)

Here are the detailed steps:

1. Open Oracle Visual Builder Studio.
2. Click the **Layouts** tab.
3. In the left pane of the Layouts tab, click the **Accounts** tab.

4. On the Accounts tab in the right pane, click the **Variables** tab.
5. In the **Constants** section, select the **showMultipleIndustriesSection** constant and set the **Default Value** to **True**.



## How can I get VB Studio provisioned in a development environment?

Log a service request to get Oracle Visual Builder Studio provisioned in development environments. By default, VB Studio is provisioned only in test environments.

**Note:** If your pods are updated to Oracle Fusion Advanced Collections Cloud Service (FAaaS), then VB Studio is associated using shell instances to every nonproduction pod in the family. In this case, moving the VB Studio instance from one Oracle Fusion pod to another isn't required.

## Can an action chain automatically start a call and send an email in Oracle Sales in the Redwood User Experience?

Yes, you can automatically start a call and send an email from an action chain by incorporating the `mailto://` and `tel:` URLs.

## What SQL query can I use to get a list of the values in lists of values (Lookup Types) in Oracle Sales?

Lookup codes are stored in the FND\_LOOKUP\_VALUES\_B table. Here's a sample query that you can use to extract the values from lookup types.

```
select * from FND_LOOKUP_VALUES_B where LOOKUP_TYPE = 'XXXXX' order by LOOKUP_CODE;
```

```
select FND_LOOKUP_VALUES_B.LOOKUP_CODE, MEANING
from FND_LOOKUP_VALUES_B, FND_LOOKUP_TYPES, FND_LOOKUP_VALUES_TL
where FND_LOOKUP_VALUES_B.LOOKUP_TYPE = FND_LOOKUP_TYPES.LOOKUP_TYPE
and FND_LOOKUP_VALUES_TL.LOOKUP_CODE = FND_LOOKUP_VALUES_B.LOOKUP_CODE
and FND_LOOKUP_TYPES.LOOKUP_TYPE LIKE 'XYZ'
and LANGUAGE = 'US'
order by FND_LOOKUP_VALUES_B.LOOKUP_CODE;
```

## How can I enable navigation to Oracle Sales in the Redwood User Experience pages from Bell notifications?

If all users are on Oracle Sales in the Redwood User Experience, then you can turn on navigation to Redwood pages for everyone by setting the profile option Navigation from Notifications to Sales in the Redwood User Experience Enabled (ORA\_ZCA\_CX\_REDWOOD\_NAVIGATION) to Y.

To enable the navigation for a subset of users, add the following privilege to any custom role: ZBS\_NOTIFICATION\_DRILLDOWN\_VBCS\_PRIV. You don't need to add the privilege if you turned on the navigation using the profile option.

## How can I change object display names in the Redwood User Experience UIs?

Use the User Interface Text tool to change text in application components, including object display names. Oracle doesn't recommend using Oracle Visual Builder Studio for this purpose.

For details on how to use this tool, see the topic [Modify Text Using User Interface Text Tool](#).

## Can I reuse the work I've done to develop Redwood UI in other environments?

Yes. The build process packages and deploys the code from GIT to the target environment. A best practice is to have one branch for each environment. For example, you can have a main branch for your primary development or test environments, and a production branch for the production environment. Additional environments can have their own branches. You can merge the code into a release-level branch, and then do a build from that branch to deploy to the environment.

For details, see the [Oracle Cloud Administering Visual Builder Studio](#) guide.

## Why can I do if I see a blank list of fields when I want to add fields to layouts I imported from the CX Extension Generator to VB Studio?

Check if you have more than 50 workspaces in Oracle Visual Builder Studio and delete any unused ones.

By default, the version of IDCS/IAM that comes with Oracle Fusion allows up to 50 OAuth connections.

Here's how to delete workspaces:

1. Open Visual Builder Studio from the Navigator.
2. Click the **Workspaces** tab.
3. Click the **Actions** menu (three dots) on the workspace and click **Delete**.

## Can I display all of the fields in Application Composer using Oracle Visual Builder Studio?

Only fields with REST end points show up in Oracle Visual Builder Studio. In Application Composer, a field with a REST end point has an API name. Fields without REST end points aren't visible in VB Studio.

## If I'm implementing both Sales and Service, do I need to create separate VB Studio projects?

Yes, Oracle highly recommends creating separate projects for Oracle Sales in the Redwood User Experience and for Fusion Service. The project you create for Sales must use the extension ID: `site_cxsales_Extension` (capitalization is important).

## How do I delete a product group and re-use the reference numbers?

You can delete a product group and re-use the PUID only if the product group is not published.

You can't delete a published product group.

## How do I upload an attachment using Activity Service WSDL?

In this use case, we'll upload an attachment using Activity Service WSDL.

Operation: **createAttachment**

### Request Body

```
<soapenv:Envelope xmlns:obj="http://xmlns.oracle.com/apps/crmCommon/objects/objectsService/" xmlns:soapenv="http://schemas.xmlsoap.org/soap/envelope/"
 xmlns:typ="http://xmlns.oracle.com/apps/crmCommon/activities/activityManagementService/types/">
 <soapenv:Body>
 <typ:createAttachment>
 <typ:attachmentRows>
 <obj:EntityName>ZCA_SALES_PARTY</obj:EntityName>
 <obj:Pk1Value>100014129759978</obj:Pk1Value>
 <obj:DatatypeCode>FILE</obj:DatatypeCode>
 <obj:Description>Description5</obj:Description>
 <obj:FileName>File Name.txt</obj:FileName>
 <obj:Title>Title</obj:Title>
 <obj:DmRepository>FusionAppsContentRepository</obj:DmRepository>
 <obj:DownloadStatus>N</obj:DownloadStatus>
 <obj:CategoryName>MISC</obj:CategoryName>
 <obj:UploadedFile>UmFnGF2YQ==</obj:UploadedFile>
 </typ:attachmentRows>
 <typ:commitData>true</typ:commitData>
 </typ:createAttachment>
 </soapenv:Body>
</soapenv:Envelope>
```

```
</soapenv:Body>
</soapenv:Envelope>
```

### Response Body

```
<env:Envelope xmlns:env="http://schemas.xmlsoap.org/soap/envelope/" xmlns:wsa="http://
www.w3.org/2005/08/addressing">
<env:Header>
<wsa:Action>http://xmlns.oracle.com/apps/crmCommon/activities/activityManagementService/
ActivityService/createAttachmentResponse</wsa:Action>
<wsa:MessageID>urn:uuid:cd305321-f185-40a0-b41c-fa2efdaa4a09</wsa:MessageID>
</env:Header>
<env:Body>
<ns0:createAttachmentResponse xmlns:ns0="http://xmlns.oracle.com/apps/crmCommon/
activities/activityManagementService/types/">
<result xmlns="http://xmlns.oracle.com/apps/crmCommon/activities/
activityManagementService/types/">SUCCESS</result>
</ns0:createAttachmentResponse>
</env:Body>
</env:Envelope>
```

For more information see [SOAP Web Services for Sales and Fusion Service](#)

## Why isn't custom business logic working while importing high-volume data?

Set the high-volume import mode to 'No' to run custom business logic. The high-volume import mode is designed to import millions of records at once. This mode doesn't trigger any custom logic configured through the application composer.

For a list of supported objects, see [What are the available data import options?](#)

**Note:** If ZCA\_FILE\_IMPORT\_ENABLE\_CUSTOM\_BUSINESS\_LOGIC is set to "Yes", then you won't be able to use High Volume import.

## How do I get long text field value in a REST API call?

Long Text fields are base64 encoded. You need to decode them using base64 again to get the long text field value.

Alternatively, you can also explicitly include `?fields=<NameofField1>,<NameOfLongTextField>,<and so on>` in your request to receive the long text value in the rest response.

For more information see [Manage Collections](#).

## Do the Groovy scripts created in Application Composer work in Oracle Sales in the Redwood User Experience?

All triggers except Before Create work in Redwood. In the Redwood UI, field validations run when the record is saved to the server and not as you tab out of the field.

## In a fixed-choice list field in the Redwood UI, is there any way of deleting the value other than using the keyboard?

No. In the Redwood user experience, you must use the backspace or delete actions to remove values in a fixed-choice list field. There isn't a way of selecting a null value from the list itself.

## How can I change the From address for emails send using the Send Email smart action from Oracle Sales in the Redwood User Experience?

You can change the From email address in outbound emails by setting the profile option **Use an Oracle E-Mail Address as the Sender in the Service Application** (SVC\_OUTBOUND\_EMAIL\_ORACLE\_SENDER) to No, and entering the email address in the profile option **Service Application From Address for Outbound E-mail** (SVC\_OUTBOUND\_EMAIL\_FROM). Here are the details.

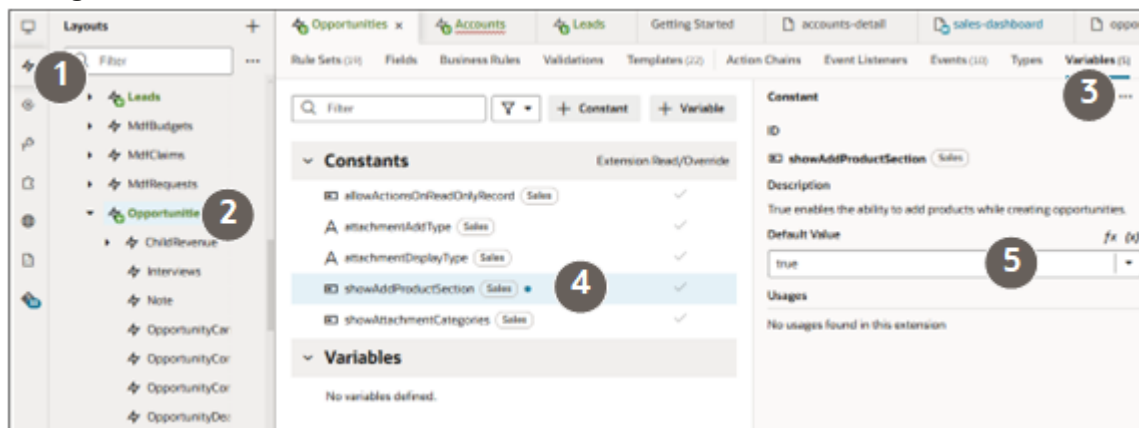
1. In Setup and Maintenance work area, open the **Manage Administrator Profile Values** task in the Sales offering (**Sales Foundation > Manage Administrator Profile Values**).
2. Search for the profile option code SVC\_OUTBOUND\_EMAIL\_ORACLE\_SENDER and set it to No at the site level.
3. Search for the profile option code SVC\_OUTBOUND\_EMAIL\_FROM and enter the email address you want to use as the From address on outbound emails.
4. To ensure the email address doesn't get classified as spam, create a service request asking Oracle support to add a DomainKeys Identified Mail (DKIM) signature to the Sender Policy Framework (SPF).

## How do I enable the addition of products on the opportunity creation page in Oracle Sales in the Redwood User Experience?

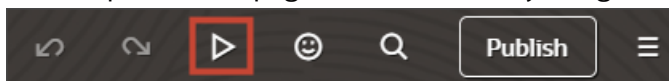
Enabling the addition of products on the Create Opportunity page is as simple as changing the value of the `showAddProductSection` constant in Oracle Visual Builder Studio. Setting the value to true, adds a section to the Create page where salespeople can add multiple products.

Here's how to set the value of the constant:

1. In VB Studio, click the **Layouts** tab.
2. In the left pane, open the **CX Sales** node and click **Opportunities**.
3. In the right pane, click the **Variables** tab.
4. Select the **showAddProductSection** constant.
5. Change the **Default Value** to true.



6. You can preview the page from VB Studio by using the **Preview** button.



## Why can't I find my activities using Find or Advanced Search in the Classic UI?

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

The different record sets in the Saved Searches window restrict your saved searches to different sets of activities. To improve saved search performance, restrict your saved searches to smaller record sets. Rather than searching all



the records you can see, search all the records you and your subordinates own. Or restrict your searches to a smaller geographical area. For example, search all the activities in one state instead of the whole country.

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

| Record Set Name       | Description                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| I own                 | Activities you either created or ownership was assigned to you.                                                                                                                                                                                                                                                                                                                                                                                 |
| I am a resource       | Activities where you're a resource.                                                                                                                                                                                                                                                                                                                                                                                                             |
| My subordinates own   | Activities owned by you and your subordinates.                                                                                                                                                                                                                                                                                                                                                                                                  |
| All records I can see | <p>Activities that you can view based on your resource team membership, sales territory assignments, your position in the organization, and security permissions.</p> <p>This record set is available only if the administrator enables it by setting the profile option, All Records I Can See Enabled, to Yes. By default, the value is No, meaning salespeople can only search activities they own or are associated with as a resource.</p> |

Here's how to set the All Records I Can See Enabled (ZMM\_ACTIVITY\_ENABLE\_ALL\_RECORDS) profile option.

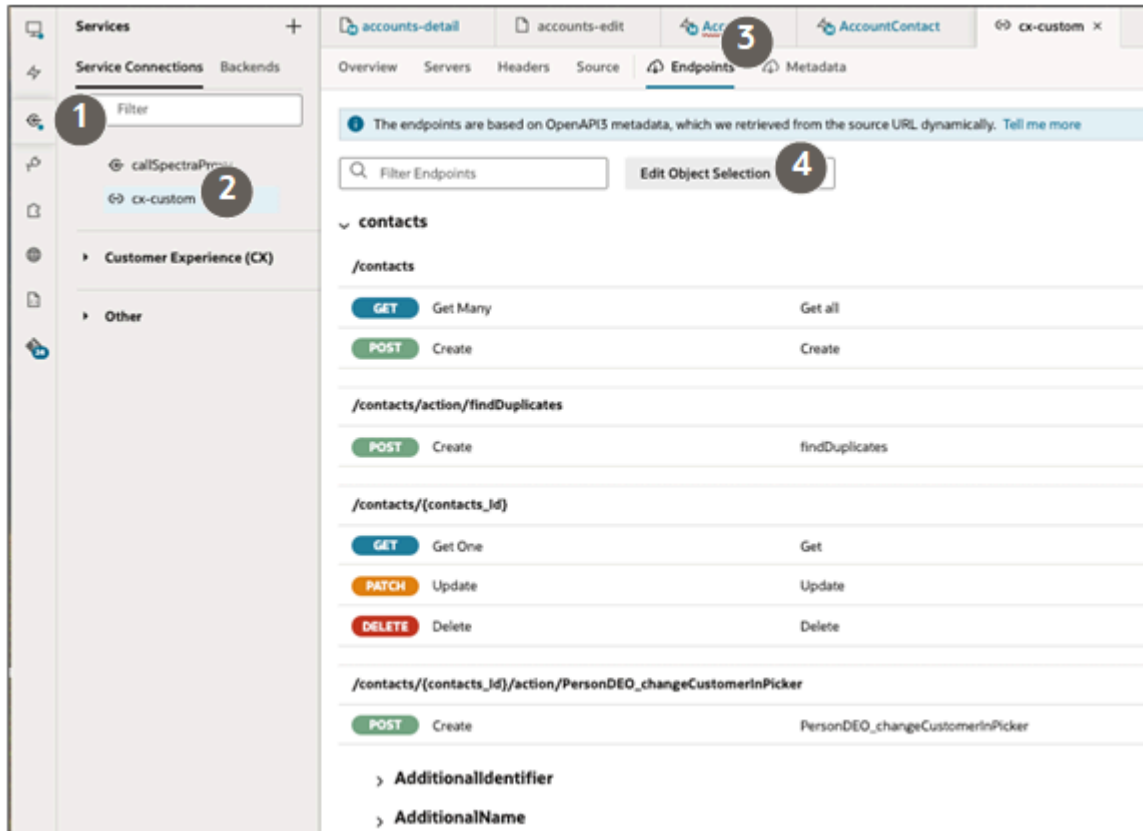
1. In the Setup and Maintenance area, go to:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Activity Profile Options
2. Click the **ZMM\_ACTIVITY\_ENABLE\_ALL\_RECORDS** link.
3. To enable access at the site level, select **Yes** in the Profile Value field.
4. To enable access for specific users:
  - a. Click the **Add** icon.
  - b. In the Profile Level field, select **User**.
  - c. In the User Name field, search for and select the user name.
  - d. Select **Yes** in the Profile Value field.
5. Click **Save and Close**.

## What can I do if I can't open the custom object that I created using the Extension Generator in VB Studio?

If you can't open the custom object you created in Extension Generator in Oracle Visual Builder Studio, chances are that you've used the **Create New Extension** button multiple times in your environment. You can only use this button the first time you create an extension. To add custom objects later, you must instead click **Import Extension** and import the .zip file you exported from VB Studio.

Using the **Create New Extension** button multiple times overwrites existing content in VB Studio. This topic explains how to restore the overwritten objects in VB Studio.

1. Open VB Studio.
2. Enable the service connection for the object:
  - a. Click the **Services** tab and the **Service Connections** subtab.
  - b. On the Service Connections subtab, click **cx-custom**
  - c. In the right pane, click the **Endpoints** tab.
  - d. Click the **Edit Object Selection** button.



- e. On the Edit Object Selection page, search for and select the custom object that needs to be available in Redwood.
- f. Save.
3. Edit the application JSON:
  - a. Click the **Source** tab.
  - b. Open the **extension1** folder: **extension1** > **sources** > **ui** > **self** > **applications** > **flows** > **application**
  - c. Click **{application}**.
  - d. Click the JSON tab in the right pane.
  - e. For each object, add the following code in "flows": (
 

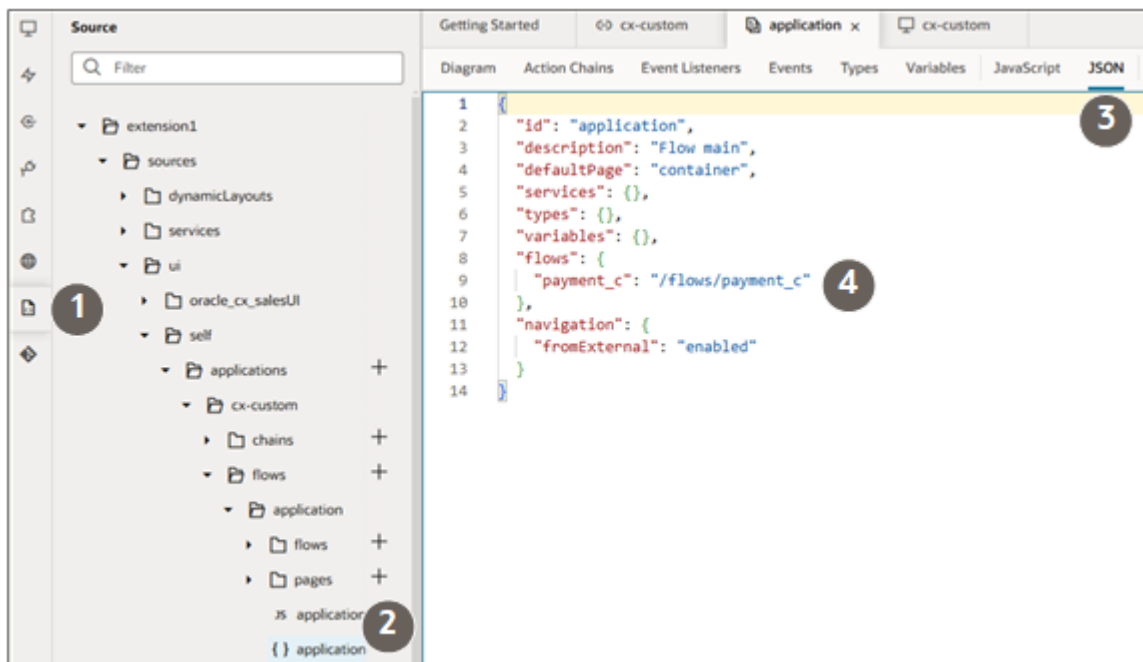
```
"<object API name>": "/flows/<object API name>"
```

 Here's an example of an entry for the payment object:
 

```
"payment_c": "/flows/payment_c"
```

The complete JSON entry now looks like this:

```
{
 "id": "application",
 "description": "Flow main",
 "defaultPage": "container",
 "services": {},
 "types": {},
 "variables": {},
 "flows": {
 "payment_c": "/flows/payment_c"
 },
 "navigation": {
 "fromExternal": "enabled"
 }
}
```



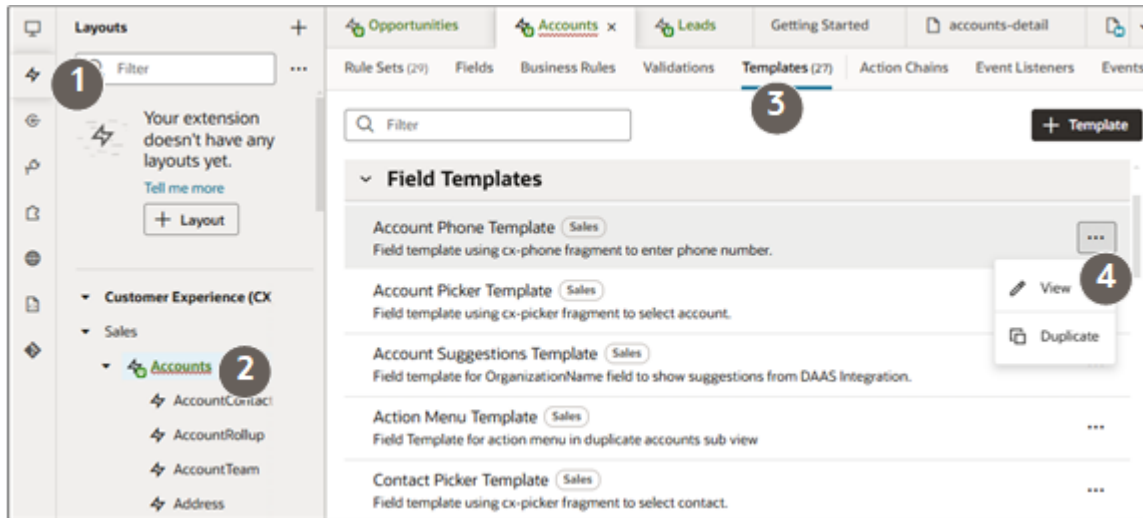
## How can I make entry in the phone field required on the account edit page but not on the create page in Sales in the Redwood User Experience?

You can make entry in the phone field required by creating a field template where the entry is required and mapping the new template to the phone field on the page.

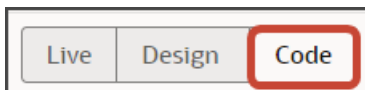
Here's how to make the phone field required on the account edit page:

1. Open Oracle Visual Builder Studio.
2. Create a field template that makes the entry required:
  - a. Click the **Layouts** tab.

- b. Open the **Sales** node and click **Accounts**.
- c. Click the **Templates** tab in the right pane.
- d. On the **Account Phone Template**, click the **Actions** menu (three dots) and select **Duplicate**.

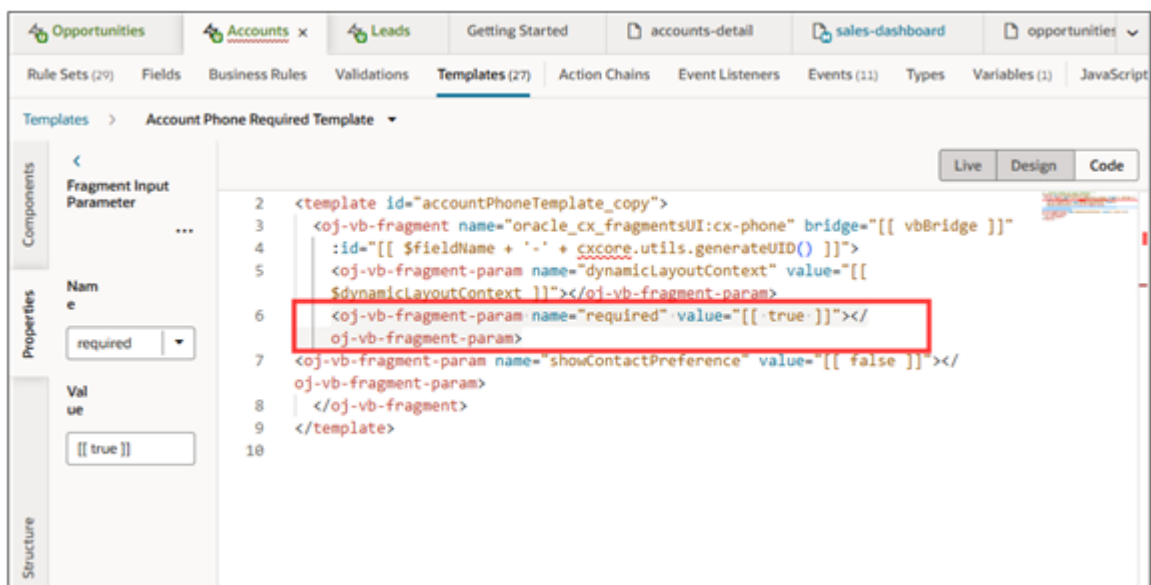


- e. In the Duplicate Template dialog, **Label** field, enter a name such as Account Phone Required Template.
- f. Optionally, change the **ID** and enter a description.
- g. Click the **Duplicate** button.
- h. Edit the duplicated template. (Click **Actions** (three dots menu on the right side) and select **Edit**).
- i. Click the **Code** button to view the template code.

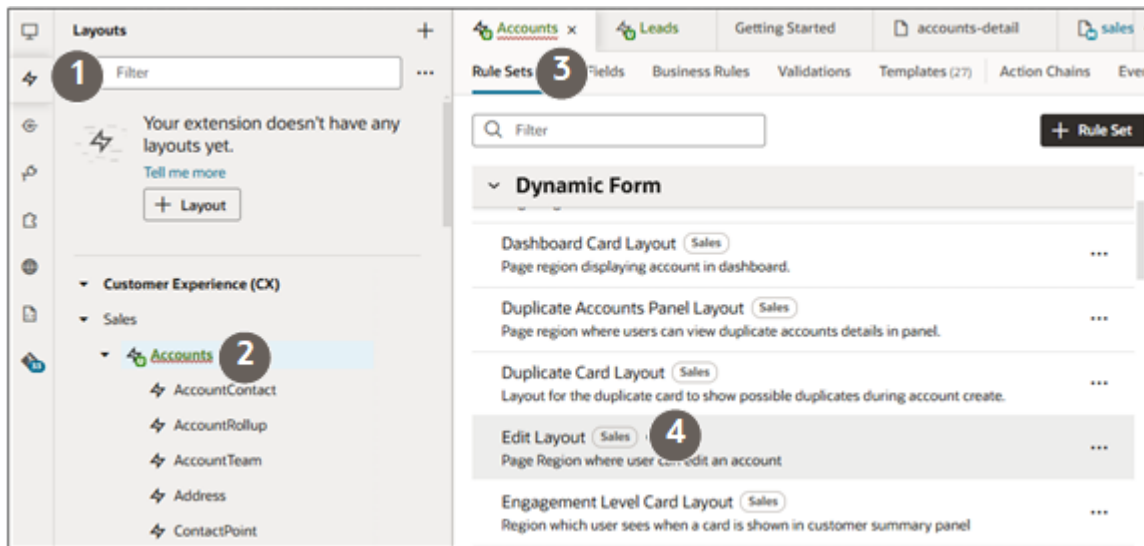


- j. Insert the following parameter in the code:

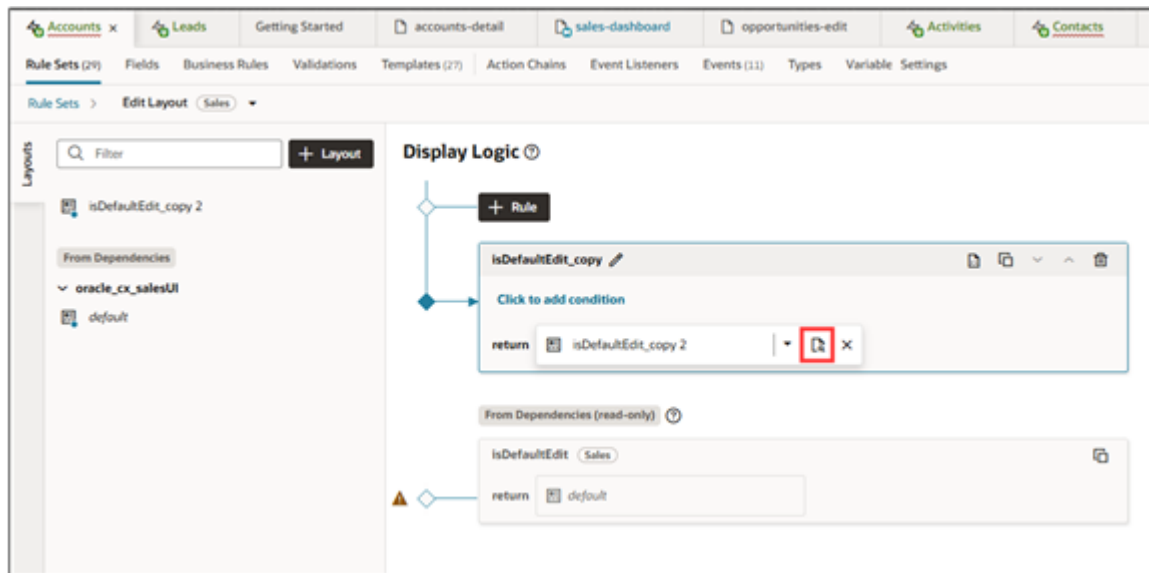
```
<oj-vb-fragment-param name="required" value="[[true]]"></oj-vb-fragment-param>
```



3. Duplicate the edit page layout and associate the new field template to the field:
  - a. Click the Layouts tab.
  - b. Open the **Sales** node and click **Accounts**.
  - c. On the Account tab in the right pane, click the **Rule Sets** subtab.
  - d. Click the **Edit Layout** layout to open the rule set display logic.



4. In the Display Logic tab, duplicate the **isDefaultEdit** rule. Leave the **Also create a copy of the layout** option



selected.

5. Click **Open** on the copy you just made. (Hover over the **return** field to see the icon.)

6. Click the **Phone** field and then click the **Override** link in the Show Field panel.

**Select fields to display**

- OrganizationName
- Type
- ParentAccountPartyId (Parent Account Template)
- IndustryCode
- OrganizationTypeCode
- URL
- PrimaryContactPartyId (Contact Picker Template)
- OwnerPartyId (Owner Picker Template)
- Virtual Field**
- { \ Phone (Account Phone Template) 1**
- { \ FormattedAddress\_address (Account Address Template)

**Show Field**

Always

ID \*

Phone

① Field is mapped to a built-in default template defined on the rule set

[Override 2](#)

**Template**

Account Phone Template

Field template using cx-phone fragment to enter phone number.

[Go to Template](#)

7. Select the new template.

**Show Field**

Always

ID \*

Phone

① Field is mapped to a template on this layout, which overrides the default template (Account Phone Template)

[Reset](#) [Set as rule set default](#)

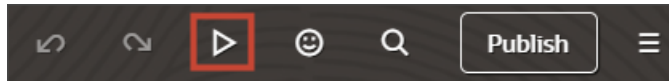
**Template** [Create](#)

Account Phone Required Template

Field template using cx-phone fragment to require phone number.

[Go to Template](#)

8. You can preview the page using the **Preview** button. The phone field should have the Required label. Saving is disabled unless you make an entry.

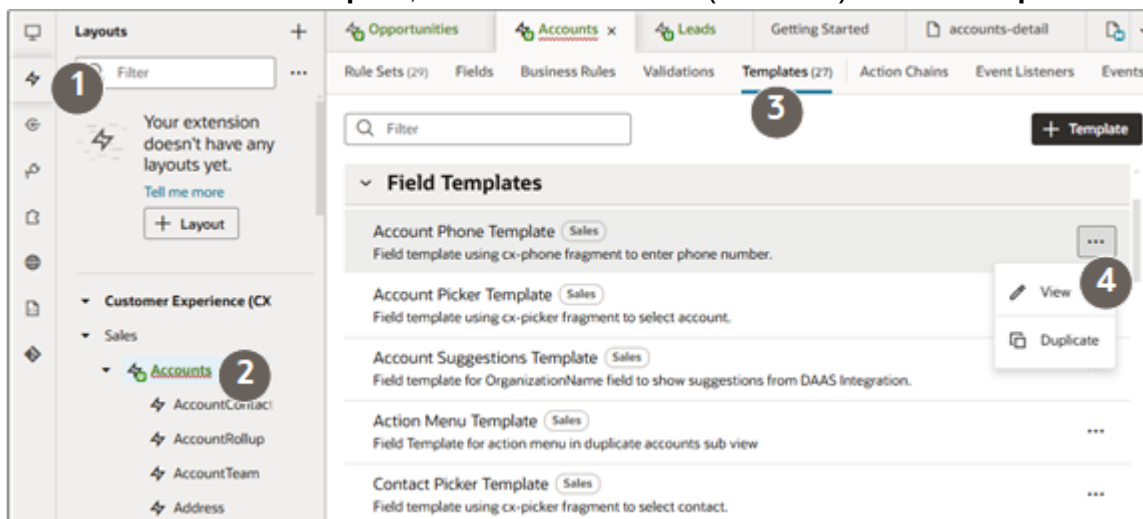


## How can I display the contact preferences on a page in Oracle Sales in the Redwood User Experience?

You can display the contact preferences by setting the value of the field template parameter showContactPreference to true. There's a separate field template for displaying the contact preferences for a phone number and for an email address.

Here's how to display the account phone contact preferences on the account edit page:

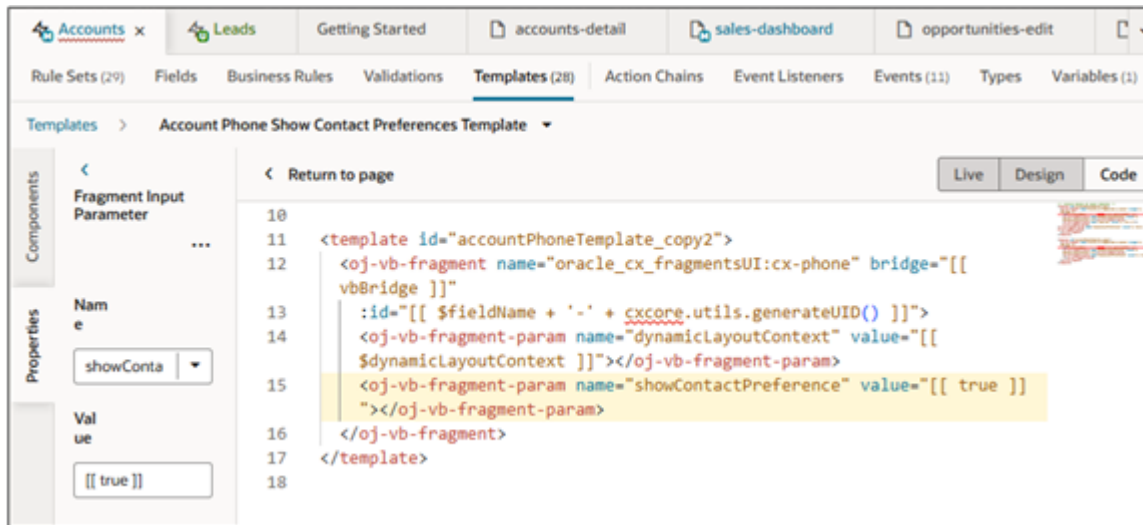
1. Open Oracle Visual Builder Studio.
2. Create a field template that displays the phone contact preferences:
  - a. Click the **Layouts** tab.
  - b. Open the **Sales** node and click **Accounts**.
  - c. Click the **Templates** tab in the right pane.
  - d. On the **Account Phone Template**, click the **Actions** menu (three dots) and select **Duplicate**.



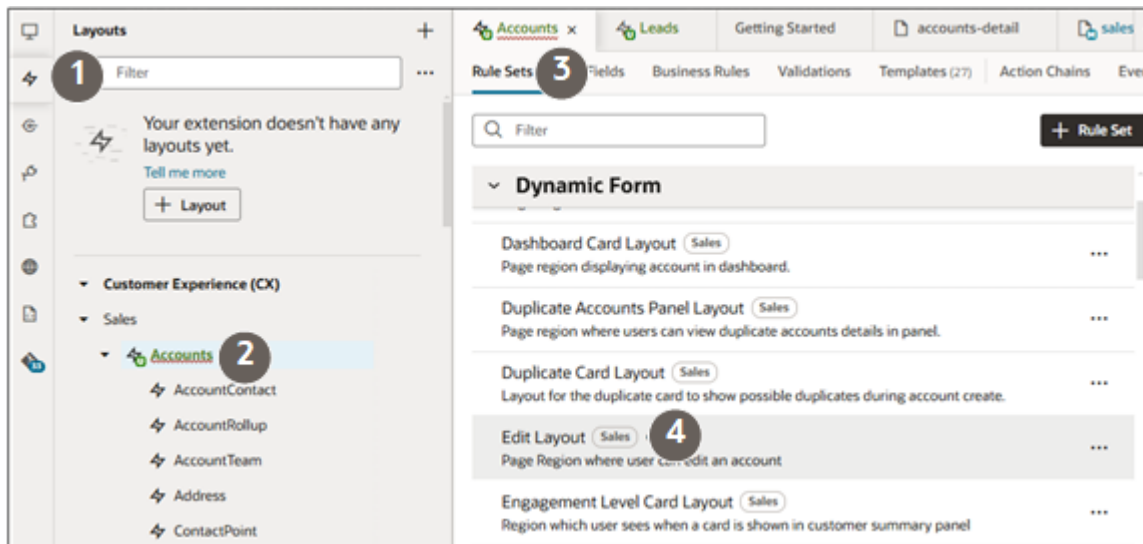
- e. In the Duplicate Template dialog, **Label** field, enter a name such as Account Show Phone Contact Preferences.
- f. Optionally, change the **ID** and enter a description.
- g. Click the **Duplicate** button.
- h. Edit the duplicated template. (Click **Actions** (three dots menu on the right side) and select **Edit**).
- i. Click the **Code** button to view the template code.



- j. Change the **value** of the **ShowContact Preference** parameter to true.

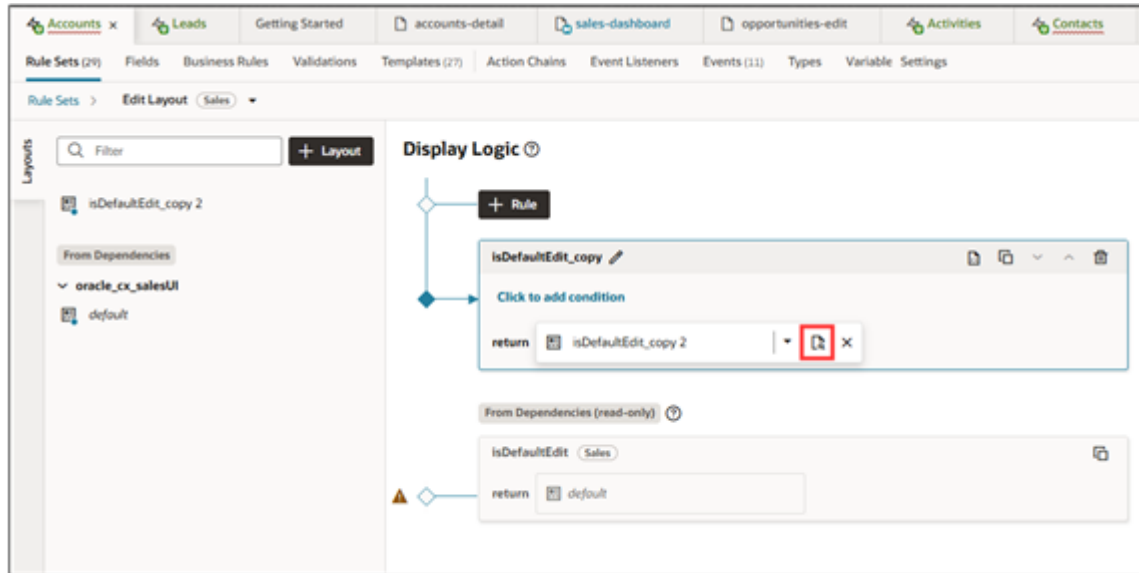


3. Duplicate the edit page layout and associate the new field template to the field:
- Click the Layouts tab.
  - Open the **Sales** node and click **Accounts**.
  - On the Account tab in the right pane, click the **Rule Sets** subtab.
  - Click the **Edit Layout** layout to open the rule set display logic.

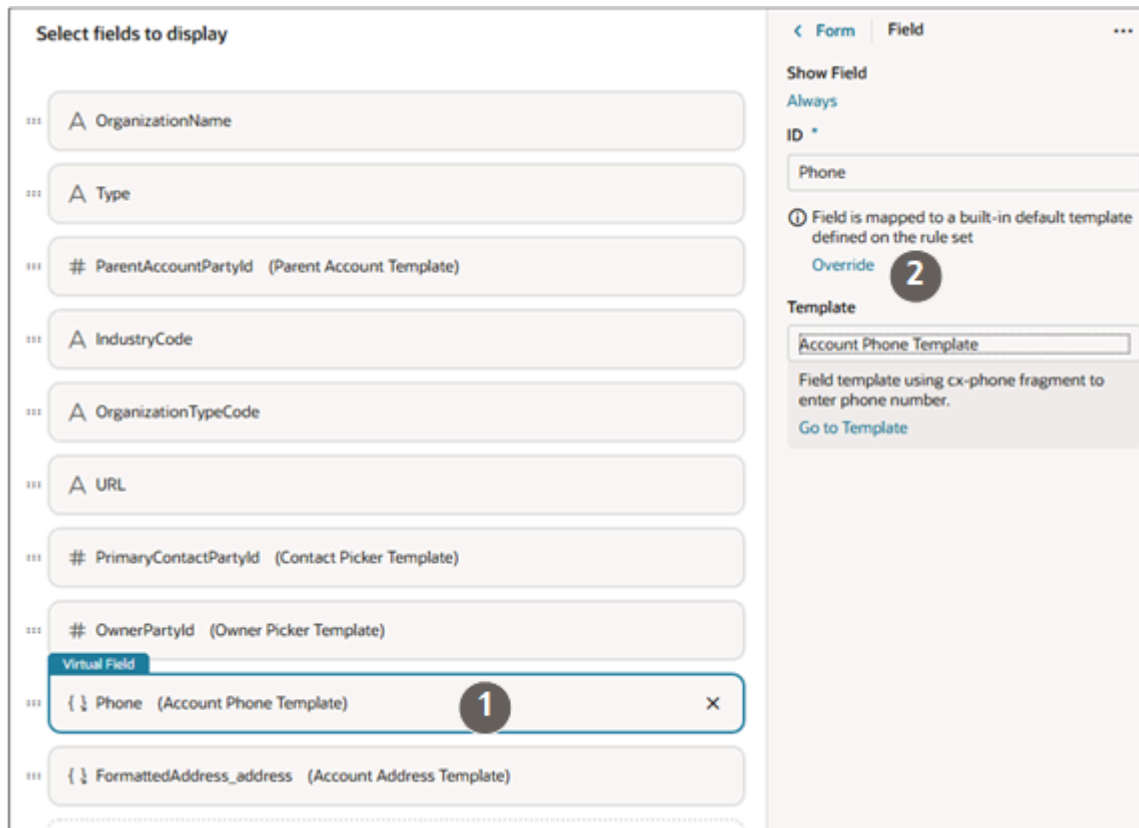




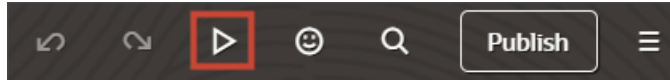
4. In the Display Logic tab, duplicate the **isDefaultEdit** rule. Leave the **Also create a copy of the layout** option selected.



5. Click **Open** on the copy you just made. (Hover over the **return** field to see the icon.)
6. In the Show Field panel, click the **Phone** field and then click the **Override** link.



7. Select the new template.
8. You can preview the page using the **Preview** button. The phone field should have the Required label. Saving is disabled unless you make an entry.



## How can I add the line under the title so my custom panel looks like the other panels?

Add the following style code to the custom template to display the title underline.

```
<style>
.oracle-cx-fragmentsUI-cx-fragment-container .oj-sp-foldout-panel-title-underline { background-color:
var(--cx-pillar-color) !important; }
</style>
```

Here's an example of the style code inserted in the panel template code:

```
<template id="opportunitiesPanelTemplate2">
<div class="oj-flex">
<style>
.oracle-cx-fragmentsUI-cx-fragment-container .oj-sp-foldout-panel-title-underline { background-color: var(--
cx-pillar-color) !important; }
</style>
<oj-vb-fragment name="oracle_cx_fragmentsUI:cx-panel" class="oj-sp-foldout-layout-panel"
 bridge="[[vbBridge]]">
<oj-vb-fragment-param name="resource"
 value='[[[{"name": "opportunities", "primaryKey": "OptyId", "puid": "OptyNumber" }]]'></oj-vb-fragment-
param>
<oj-vb-fragment-param name="sortCriteria" value='[[[{"attribute": "EffectiveDate", "direction":
 "descending" }]]]'></oj-vb-fragment-param>
<oj-vb-fragment-param name="query"
 value='[[[{"type": "qbe", "provider": "adfRest", "params": [{"key": "TargetPartyId", "value":
 $base.page.variables.id }]]]'></oj-vb-fragment-param>
<oj-vb-fragment-param name="rollupLayoutId" value="[['OpportunityLayout']]"></oj-vb-fragment-param>
<oj-vb-fragment-param name="title"
 value="[[$page.translations.partiesResourceBundle['Header.Opportunities']]"></oj-vb-fragment-param>
<oj-vb-fragment-param name="dynamicLayoutContext" value="{ { $dynamicLayoutContext } }"></oj-vb-fragment-
param>
</oj-vb-fragment>
</template>
```

## Why don't I see the plus (+) icon to add an ad hoc approver for my contract?

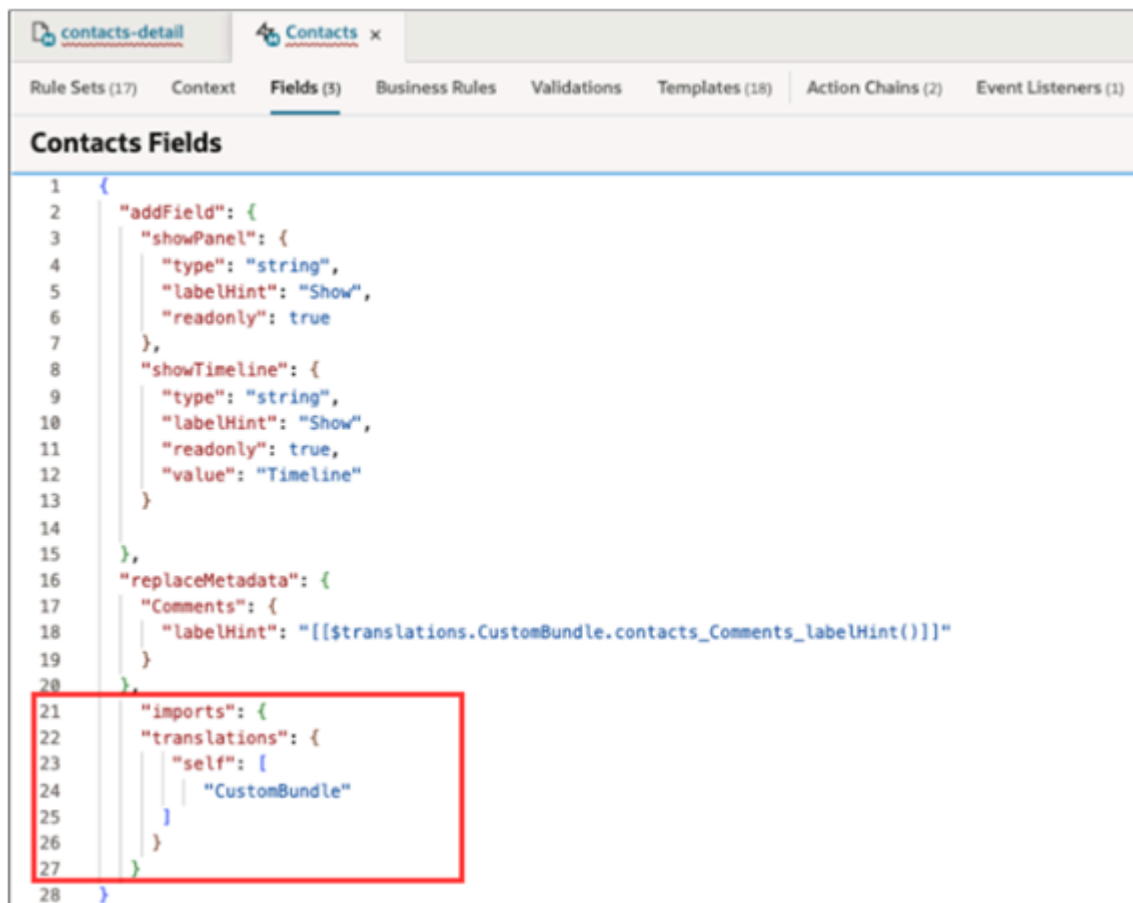
A contract needs approval before it's executed. After you submit a contract for approval, you can add more approvers while approving a contract. Once you select the specific approvers you want, its only then that the plus (+) icon displays. Click the plus icon to add an ad hoc approver to the contract.

# How do I fix a field translation string that doesn't display in Oracle Sales in the Redwood User Experience?

If a translation string you created for a field in Oracle Visual Builder Studio (VB Studio) doesn't display, then the metadata for importing the translation may be missing. Here's how to add it.

1. In VB Studio, click the **Layouts** tab.
2. Click the object.
3. Click the **Fields** subtab in the right pane and select the field.
4. Click the **JSON** button.
5. Add the following code:

```
"imports": {
 "translations": {
 "self": [
 "CustomBundleName"
]
 }
}
```

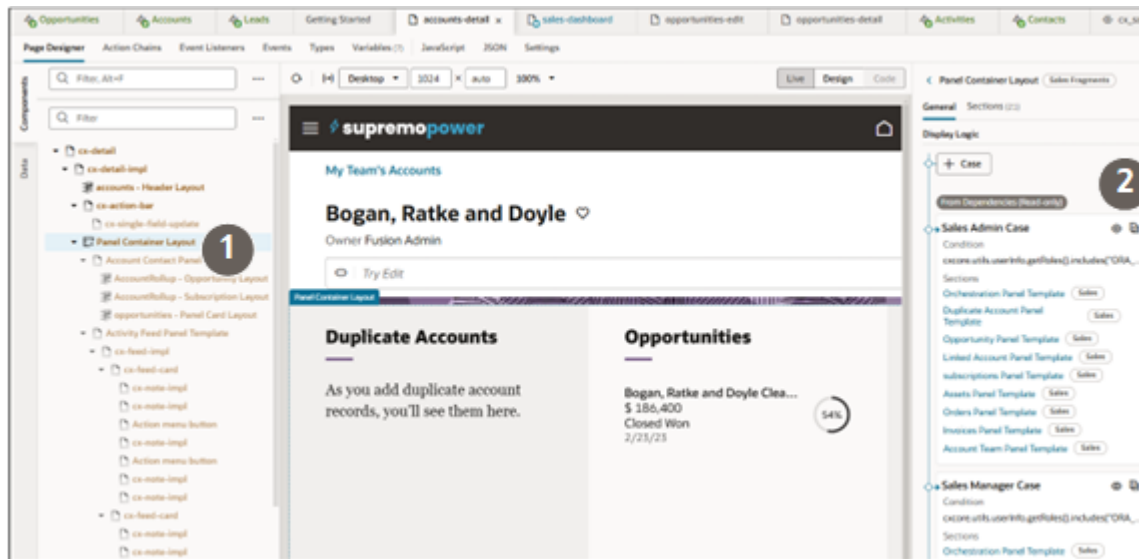


# How can I change the Opportunity panel on accounts to display only open opportunities?

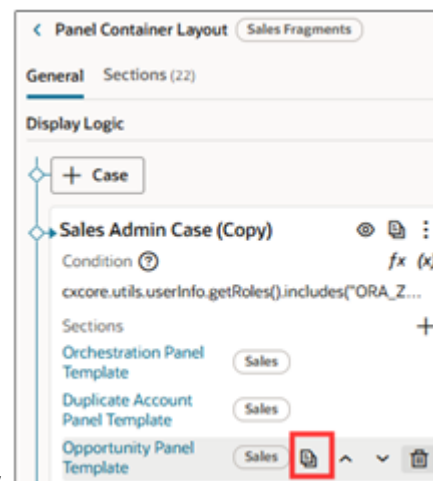
By default, the Opportunities panel on the account details page displays both open and closed opportunities, but you can use Oracle Visual Builder Studio to change the query parameters and display only open opportunities.

Here's how to create a panel that displays only open opportunities on Accounts:

1. In Oracle Sales in the Redwood User Experience, open one of the accounts to display the details page.
2. From the **Settings and Actions** menu, select **Edit Page in Visual Builder Studio**.
3. In the Components panel, click **Panel Container Layout**.
4. In the Display Logic panel on the right, duplicate one of the layouts provided by Oracle. Oracle provides 3 layouts targeted at sales administrators, sales managers, and sales representatives.



5. Check the **Condition** field of the copy and make sure that you have the appropriate job roles to preview the results. You can assign the roles to yourself in the Security Console or temporarily delete all conditions to make your copy the default.
- 6.



Duplicate the **Opportunity Panel Template** in the layout copy.

7. Click the name of the copy you made to open it.
8. Click the **Code** button.



9. Replace the variable in the title parameter with a title of your own title, for example: Open Opportunities. Here's the resulting code:
10. Add the following filter in the query to display only opportunities with the status of open: {"key": "StatusCode", "value": "Open", "conjunction": "AND"}

Here's the complete query parameter:

```
<oj-vb-fragment-param name="title" value="['Open Opportunities']"></oj-vb-fragment-param>

<oj-vb-fragment-param name="query"
 value='[[{"type": "qbe", "provider": "adfRest", "params": [{"key": "TargetPartyId", "value":
 $base.page.variables.id }, {"key": "StatusCode", "value": "Open", "conjunction": "AND"}]}]'></oj-vb-
fragment-param>
```

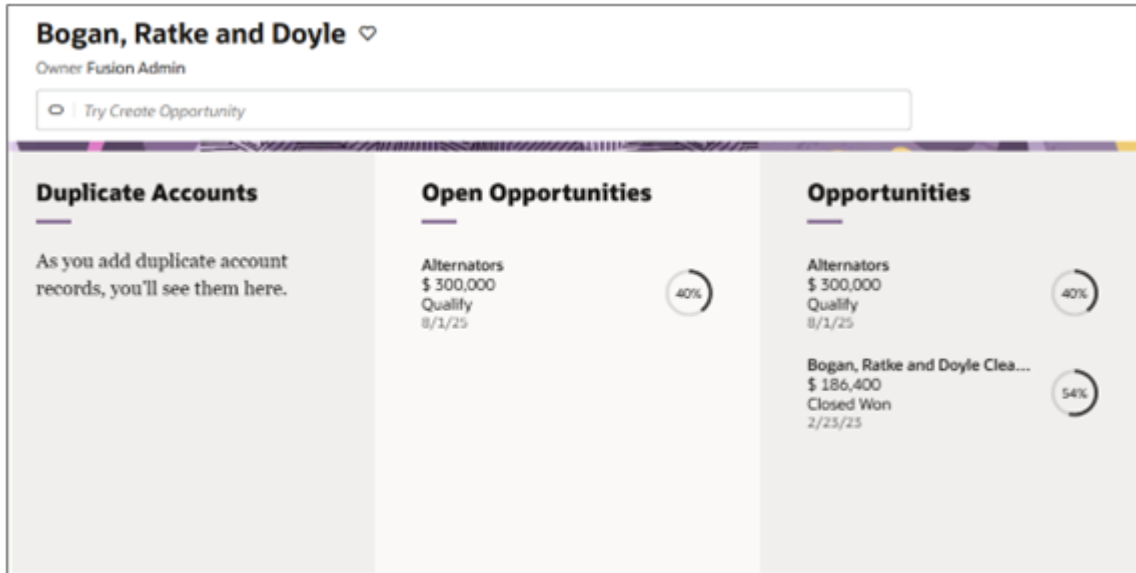
The complete code will look similar to this:

```
<template id="opportunitiesPanelTemplate2">
 <oj-vb-fragment name="oracle_cx_fragmentsUI:cx-panel" class="oj-sp-foldout-layout-panel"
 bridge="[vbBridge]">
 <oj-vb-fragment-param name="resource"
 value='[[{"name": "opportunities", "primaryKey": "OptyId", "puid": "OptyNumber" }]'></oj-vb-
fragment-param>
 <oj-vb-fragment-param name="sortCriteria" value='[[{"attribute": "EffectiveDate", "direction":
 "descending" }]]'></oj-vb-fragment-param>
 <oj-vb-fragment-param name="query"
 value='[[{"type": "qbe", "provider": "adfRest", "params": [{"key": "TargetPartyId", "value":
 $base.page.variables.id }, {"key": "StatusCode", "value": "Open", "conjunction": "AND"}]}]'></oj-vb-
fragment-param>
 <oj-vb-fragment-param name="rollupLayoutId" value="['OpportunityLayout']"></oj-vb-fragment-param>
 <oj-vb-fragment-param name="title" value="['Open Opportunities']"></oj-vb-fragment-param>
 </oj-vb-fragment>
</template>
```

11. Click the **Preview** button to preview your configuration.



Here's a screenshot of the resulting Open Opportunities and Opportunities panels on the copy of the sales administrator layout.



## Can I use the cx-picker template for a read-only picker?

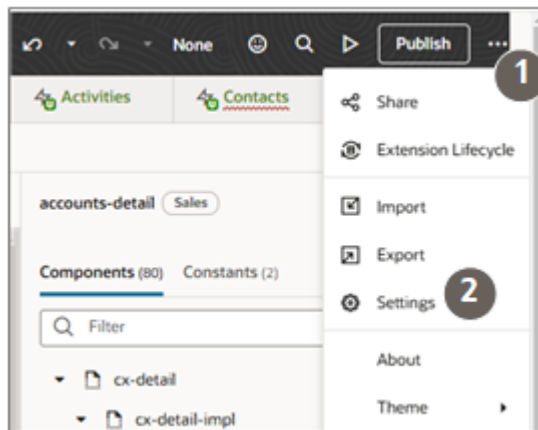
No, you must use the Select Single template for a read-only picker. The cx-picker template is for the read and write mode only.

## What do I do if my VB Studio project doesn't have the required Extension ID value of "site-cxsales\_Extension"?

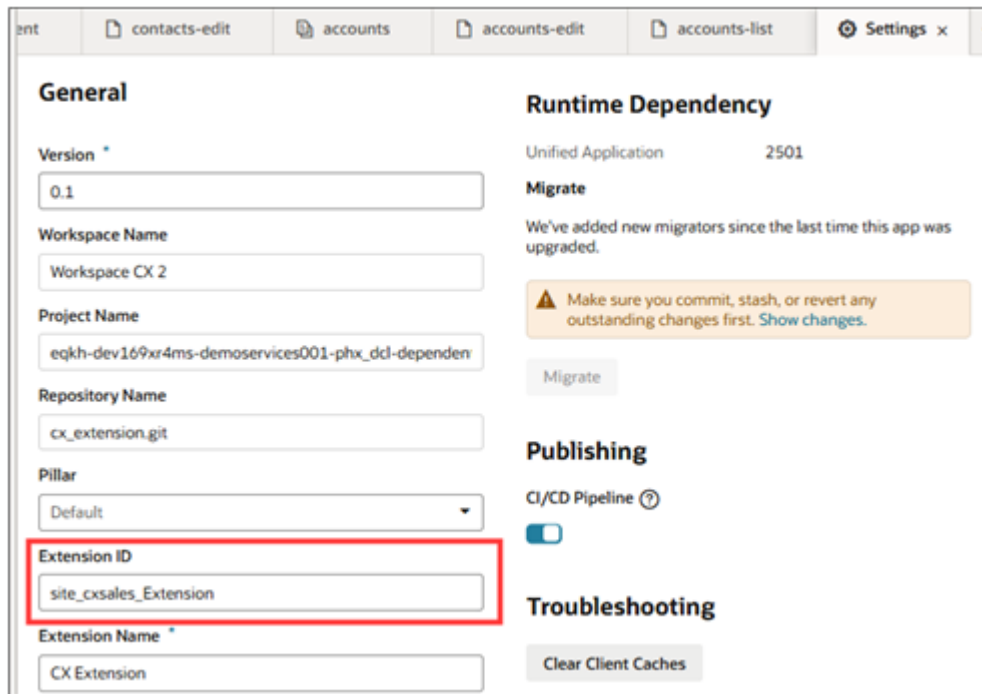
All Oracle Visual Builder Studio projects for Oracle Sales in the Redwood User Experience must have the Extension ID set to **site-cxsales\_Extension**. If your project doesn't include the required value, including the capitalization, you can use these steps to reset the value.

1. If you already published or deployed your build, then you must first uninstall it.

2. In Oracle Visual Builder Studio, click the menu icon next to the Publish button (three dots) and select **Settings**



3. In the **Extension ID** field, enter **site-cxsales\_Extension**.



## Can I change the default order in which activities are displayed in the Activities work area?

No. Oracle Sales in the Redwood User Experience displays activities sorted by relevance: the records with the highest number of hits are listed first. You can't change the way Sort by Relevance sorts the records.

## Does publishing to test in Oracle Visual Builder Studio impact existing production extensions?

Publishing in the test environment only affects the extensions in the test environment. It doesn't impact the extensions in the production environment.

## How do I import subscription data?

You can use import management to create or update Subscription records.

To import Subscription records, perform the following tasks:

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

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

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the CSV file for a successful import.

## Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

## Select a Unique Identifier for Your Records

To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. If you're creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with 'Number' and usually



visible in the business object's UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Subscription object, the attributes are SubscriptionNumber, ExemptCertificateNumber, and BillToAccountNumber.

## Required Attributes and Validations for Subscription Object

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

| Attribute                | Description                                                        | Prerequisite Setup Task/<br>Import Validations                                   | Creating a Subscription<br>Record | Updating an Existing<br>Subscription Record |
|--------------------------|--------------------------------------------------------------------|----------------------------------------------------------------------------------|-----------------------------------|---------------------------------------------|
| ChargeDefinition         | The definition that indicates the purpose of the charge.           | This must be setup in Fusion Pricing.                                            | Required                          | Not Required                                |
| DefinitionOrganizationId | The item master organization                                       | This must be a valid ORGANIZATION_ID from the HR_ALL_ORGANIZATION_UNITS_F table. | Not required                      | Not required                                |
| PartialPeriodType        | The partial period type. The values might be actual or fixed.      | Lookup: ORA_OSS_PERIOD_TYPE                                                      | Not required                      | Not required                                |
| PartialPeriodStart       | The partial period start. The values might be calendar or service. | Lookup: ORA_OSS_PERIOD_START                                                     | Not required                      | Not required                                |
| SubscriptionId           | The subscription ID                                                | This is automatically generated when the record is created.                      | Not required                      | Not required                                |
| BusinessUnitId           | The business unit ID                                               | This must be a valid business unit ID.                                           | Required                          | Not required                                |
| LegalEntityId            | The legal entity ID                                                | This must be value record as per GL_LEDGER_LE_V.                                 | Required                          | Not required                                |
| SubscriptionProfileId    | The subscription profile ID                                        | This must be a valid subscription profile ID - OSS_SUBSCRIPTION_PROFI            | Required                          | Not required                                |
| PrimaryPartyId           | The primary party ID                                               | Lookup: HZ_PARTIES                                                               | Required                          | Not required                                |
| Currency                 | The subscription currency.                                         | This must be a valid currency.                                                   | Required                          | Not required                                |

| Attribute                | Description                                    | Prerequisite Setup Task/<br>Import Validations                                                               | Creating a Subscription<br>Record | Updating an Existing<br>Subscription Record |
|--------------------------|------------------------------------------------|--------------------------------------------------------------------------------------------------------------|-----------------------------------|---------------------------------------------|
| Status                   | The subscription status                        | This must be ORA_DRAFT or ORA_ACTIVE.                                                                        | Required                          | Not required                                |
| AccountingRuleId         | The accounting rule ID                         | RA_RULES.RULE_ID where TYPE in 'A','ACC_DUR', 'PP_DR_ALL', or 'PP_DR_PP'                                     | Not required                      | Not required                                |
| TransactionTypeName      | The accounts receivables transaction type name | This must be a valid transaction type name as per the RA_CUST_TRX_TYPES_ALL table.                           | Required                          | Not required                                |
| BillToAccountId          | The bill-to account ID                         | HZ_CUST_ACCOUNTS.CUST_ACCOUNT_ID                                                                             | Required                          | Not required                                |
| BillToSiteUseId          | The bill-to site use ID                        | HZ_CUST_SITE_USES_ALL.SITE_USE_ID                                                                            | Required                          | Not required                                |
| SubscriptionNumber       | The subscription number                        | This must be a unique number. It can be an alphanumeric value. This serves as the PUID for the subscription. | Required                          | Required                                    |
| ShipToPartySiteId        | The ship-to part site ID                       | HZ_CUST_SITE_USES_ALL.SITE_USE_ID                                                                            | Not required                      | Not required                                |
| ShipToSite               | The ship-to site                               | HZ_CUST_SITE_USES_ALL.SITE_USE_ID                                                                            | Not required                      | Not required                                |
| PaymentMethod            | The payment method                             | This must be ORA_PURCHASE_ORDER or ORA_WIRE.                                                                 | Not required                      | Not required                                |
| PaymentMethodName        | The payment method name                        | This must be Purchase Order or Wire.                                                                         | Not required                      | Not required                                |
| PaymentTermsName         | The payment terms name                         | RA_TERMS_VL.NAME                                                                                             | Not required                      | Not required                                |
| TaxClassificationCode    | The tax classification code                    | LOOKUP_TYPE:<br>ZX_OUTPUT_CLASSIFICATIONS                                                                    | Not required                      | Not required                                |
| TaxClassificationMeaning | The tax classification meaning                 | LOOKUP_TYPE:<br>ZX_OUTPUT_CLASSIFICATIONS                                                                    | Not required                      | Not required                                |

| Attribute                    | Description                                      | Prerequisite Setup Task/<br>Import Validations                               | Creating a Subscription<br>Record | Updating an Existing<br>Subscription Record |
|------------------------------|--------------------------------------------------|------------------------------------------------------------------------------|-----------------------------------|---------------------------------------------|
| ExemptCertificateNumber      | The tax exempt certificate number                | ZX_EXEMPTIONS_<br>V.EXEMPT_CERTIFICATE_<br>NUMBER                            | Not required                      | Not required                                |
| ExemptReason                 | The tax exempt reason code                       | LOOKUP_TYPE: ZX_<br>EXEMPTION_CONTROL                                        | Not required                      | Not required                                |
| ExemptReasonMeaning          | The tax exempt reason meaning                    | LOOKUP_TYPE: ZX_<br>EXEMPTION_CONTROL                                        | Not required                      | Not required                                |
| TaxExemptionHandling         | The tax exemption handling code                  | LOOKUP_TYPE: ZX_<br>EXEMPTION_CONTROL                                        | Not required                      | Not required                                |
| TaxExemptionHandlingName     | The tax exemption handling name                  | LOOKUP_TYPE: ZX_<br>EXEMPTION_CONTROL                                        | Not required                      | Not required                                |
| DocumentFiscalClassification | The document fiscal classification               | ZX_FC_DOCUMENT_<br>FISCAL_<br>V.CLASSIFICATION_CODE                          | Not required                      | Not required                                |
| CustomerAcceptance           | The customer acceptance                          | Lookup:<br>ORA_OSS_CUST_ACCEPTAN<br>- Values REQUIRED OR<br>NOTREQUIRED      | Not required                      | Not required                                |
| InternalApproval             | The internal approval                            | Lookup: ORA_OSS_INT_<br>APPROVAL_OPTIONS                                     | Not required                      | Not required                                |
| LayoutTemplate               | The layout template                              | This must be a valid layout template setup in the BI publisher.              | Not required                      | Not required                                |
| CommunicationChannel         | The communication channel                        | Lookup:<br>ORA_OSS_COMM_CHANNE<br>- Values EMAIL, OFFLINE,<br>ONLINE, CUSTOM | Not required                      | Not required                                |
| PrimarySalesPerson           | The primary sales person                         | This must be a valid sales person.                                           | Not required                      | Not required                                |
| NegotiationLanguage          | The negotiation language                         | fnd_languages_<br>vi.LANGUAGE_CODE                                           | Not required                      | Not required                                |
| QuoteToContactId             | The contact ID to which renewal quote is sent to | This must be a valid contact ID.                                             | Not required                      | Not required                                |
| EnableRenewalRemindersFlag   | Check box for the enable renewal reminders       | Y or N                                                                       | Not required                      | Not required                                |

| Attribute                    | Description                            | Prerequisite Setup Task/<br>Import Validations                           | Creating a Subscription<br>Record | Updating an Existing<br>Subscription Record |
|------------------------------|----------------------------------------|--------------------------------------------------------------------------|-----------------------------------|---------------------------------------------|
| RenewalProcess               | Renewal Process                        | Lookup: ORA_OSS_RENEWAL_TYPE                                             | Not required                      | Not required                                |
| CurrencyConversionRate       | The currency conversion rate           | This must be valid as per GL_DAILY_CONVERSION_TYPES.                     | Not required                      | Not required                                |
| CurrencyConversionRateType   | The currency conversion rate type      | This must be valid as per GL_DAILY_CONVERSION_TYPES.                     | Not required                      | Not required                                |
| Duration                     | The subscription duration              | This must be an integer.                                                 | Not required                      | Not required                                |
| Period                       | The subscription period                | This must be a valid value from OSS_TIME_CODE_UNITS.                     | Not required                      | Not required                                |
| EndDate                      | The end date of the subscription       | This date must be equal to or later than the start date.                 | Not required                      | Not required                                |
| CloseReason                  | The close reason                       | Lookup: ORA_OSS_CLOSE_REASONS                                            | Not required                      | Not required                                |
| BusinessUnitName             | The business unit name                 | This must be a valid business unit name.                                 | Not required                      | Not required                                |
| LegalEntityName              | The legal entity name                  | This must be valid as per the GL_LEDGER_LE_V table.                      | Not required                      | Not required                                |
| SubscriptionProfileName      | The subscription profile name          | This must be a valid subscription profile name. OSS_SUBSCRIPTION_PROFILE | Not required                      | Not required                                |
| PrimaryPartyName             | The primary party name                 | This must be a valid party name.                                         | Not required                      | Not required                                |
| CurrencyName                 | The name of the subscription currency. | This must be a valid currency name.                                      | Not required                      | Not required                                |
| RenewalSubscriptionProfileId | The renewal subscription profile ID    | This must be a valid subscription profile ID - OSS_SUBSCRIPTION_PROFILE  | Not required                      | Not required                                |
| DefaultLanguage              | The default language                   | fnl_languages_vl.LANGUAGE_CODE                                           | Not required                      | Not required                                |

| Attribute                        | Description                                       | Prerequisite Setup Task/<br>Import Validations                                | Creating a Subscription<br>Record | Updating an Existing<br>Subscription Record |
|----------------------------------|---------------------------------------------------|-------------------------------------------------------------------------------|-----------------------------------|---------------------------------------------|
|                                  |                                                   |                                                                               |                                   |                                             |
| GenerateBillingSchedule          | The check box for generating the billing schedule | Must be Y or N                                                                | Not required                      | Not required                                |
| TransactionType                  | The accounts receivables transaction type         | This must be a valid transaction type as per the RA_CUST_TRX_TYPES_ALL table. | Not required                      | Not required                                |
| PricingSystem                    | The pricing system                                | ORA_OSS_FUSION, ORA_OSS_THIRD_PARTY                                           | Not required                      | Not required                                |
| RenewalCustomerAcceptance        | The renewal customer acceptance                   | This must either be REQUIRED or NOTREQUIRED.                                  | Not required                      | Not required                                |
| RenewalInternalApproval          | The renewal internal approval                     | This must either be REQUIRED or NOTREQUIRED.                                  | Not required                      | Not required                                |
| RenewalPriceAdjustmentBasis      | The renewal price adjustment basis                | Lookup: ORA_OSS_RNWL_PRICE_ADJ_VALUES - ORA_NET_PRICE                         | Not required                      | Not required                                |
| RenewalPriceAdjustmentPercentage | The renewal price adjustment percentage           | This must be a positive integer.                                              | Not required                      | Not required                                |
| RenewalPriceAdjustmentType       | The renewal price adjustment type                 | Lookup: ORA_OSS_RNWL_PRICE_ADJ_VALUES - ORA_MARKUP, ORA_MARKDOWN, ORA_REPRICE | Not required                      | Not required                                |
| UsageCapture                     | The usage capture mode for the subscription       | ORA_FUSION, ORA_THIRD_PARTY                                                   | Not required                      | Not required                                |
| ClosedDate                       | The date on which the subscription was closed.    | This date must be later than the start date.                                  | Not required                      | Not required                                |
| CloseCreditMethod                | The close credit method                           | Lookup: ORA_OSS_CLOSE_CREDIT_METHOD                                           | Not required                      | Not required                                |
| CancelReason                     | The reason for canceling the subscription         | This must be a valid reason. Lookup: ORA_OSS_CANCEL_REASONS                   | Not required                      | Not required                                |
| CanceledDate                     | The date on which the subscription was canceled   | This must be between the start date and the end date.                         | Not required                      | Not required                                |

| Attribute                | Description                     | Prerequisite Setup Task/<br>Import Validations                                                   | Creating a Subscription<br>Record | Updating an Existing<br>Subscription Record |
|--------------------------|---------------------------------|--------------------------------------------------------------------------------------------------|-----------------------------------|---------------------------------------------|
| BillService              | The bill service code           | Lookup: ORA_OSS_BILL_SERVICE. Values could be ORA_DO_NOT_BILL, ORA_BILL, or ORA_BILL_ON_RENEWAL. | Not required                      | Not required                                |
| BillServiceName          | The bill service option         | Lookup: ORA_OSS_BILL_SERVICE. The values might be Do not bill, Bill, or Bill on renewal.         | Not required                      | Not required                                |
| InvoicingRuleId          | The invoicing rule ID           | RA_RULES.RULE_ID where TYPE ='I'                                                                 | Not required                      | Not required                                |
| InvoicingRuleName        | The invoicing rule name         | RA_RULES.NAME where TYPE ='I'                                                                    | Not required                      | Not required                                |
| BillingDateCode          | The billing date code           | Lookup: ORA_OSS_BILLING_DATE                                                                     | Not required                      | Not required                                |
| BillingDateName          | The billing date name           | Lookup: ORA_OSS_BILLING_DATE                                                                     | Not required                      | Not required                                |
| BillingFrequency         | The billing frequency code      | oss_time_code_units.user_uom_code                                                                | Not required                      | Not required                                |
| BillingFrequencyName     | The billing frequency name      | oss_time_code_units.user_uom_code                                                                | Not required                      | Not required                                |
| AccountingRuleName       | The accounting rule name        | RA_RULES.NAME where TYPE in ('A','ACC_DUR', 'PP_DR_ALL','PP_DR_PP')                              | Not required                      | Not required                                |
| BillingSystem            | The billing system              | Lookup: ORA_OSS_BILLING_SYSTEM                                                                   | Not required                      | Not required                                |
| BillToAccountNumber      | The bill-to account number      | HZ_CUST_ACCOUNTS.ACCOUNT_NUMBER                                                                  | Not required                      | Not required                                |
| BillToAccountDescription | The bill-to account description | Lookup: HZ_CUST_ACCOUNTS                                                                         | Not required                      | Not required                                |
| BillToAddress            | The bill-to address             | Lookup: HZ_CUST_SITE_USES_ALL                                                                    | Not required                      | Not required                                |
| ShipToParty              | The ship-to party               | Lookup: HZ_PARTIES                                                                               | Not required                      | Not required                                |

| Attribute       | Description            | Prerequisite Setup Task/<br>Import Validations | Creating a Subscription<br>Record | Updating an Existing<br>Subscription Record |
|-----------------|------------------------|------------------------------------------------|-----------------------------------|---------------------------------------------|
| ShipToPartyName | The ship-to party name | Lookup: HZ_PARTIES                             | Not required                      | Not required                                |

You can view the Subscription object along with all its child objects and attributes in the Manage Import Objects page of the Import Management flow. You can find attribute information like type, length, description, and so on, on this page.

#### Note:

- To generate the billing schedule based on your pricing, set the **GenerateBillingSchedule** option to Yes and re-import the Subscription.csv file after all files have been imported. Also, to activate your subscription, you need to re-import the Subscription.csv file after importing all required files.
- Before generating the billing schedule through import make sure the imported subscription has charges in product's pricing tab. If there isn't any charge then you need to import the subscription product charge first and then generate the billing schedule.
- You can DELETE records for Subscription management while in DRAFT status.
  - To create an included warranty, you need to set the value of **warrantyYN** to Y. Included warranty can be imported only if the subscription is in Active status.
  - To import subscription contracts and supporting documents see Import Your Attachment Data in the Related Topics section. The codes for attachment categories are OSS\_SUBSCRIPTION\_AGREEMENT for supporting documents and OSS\_SUPPORTING\_DOCUMENTS for subscription primary contract attachment.
  - You can update usage quantity through import by passing **usageAcquiredFlag** as Y. Don't pass **listPrice**, **amount**, and **usagePricedFlag** attributes in your CSV file.
  - When a Subscription is activated using Import management, the approval rules aren't triggered. You can trigger the approval rules in the UI.

## Create the Source CSV File

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

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

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

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

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

## Create the Import Activity

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

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

## Review the Import Results

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

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

### Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [Import Your Attachment Data](#)

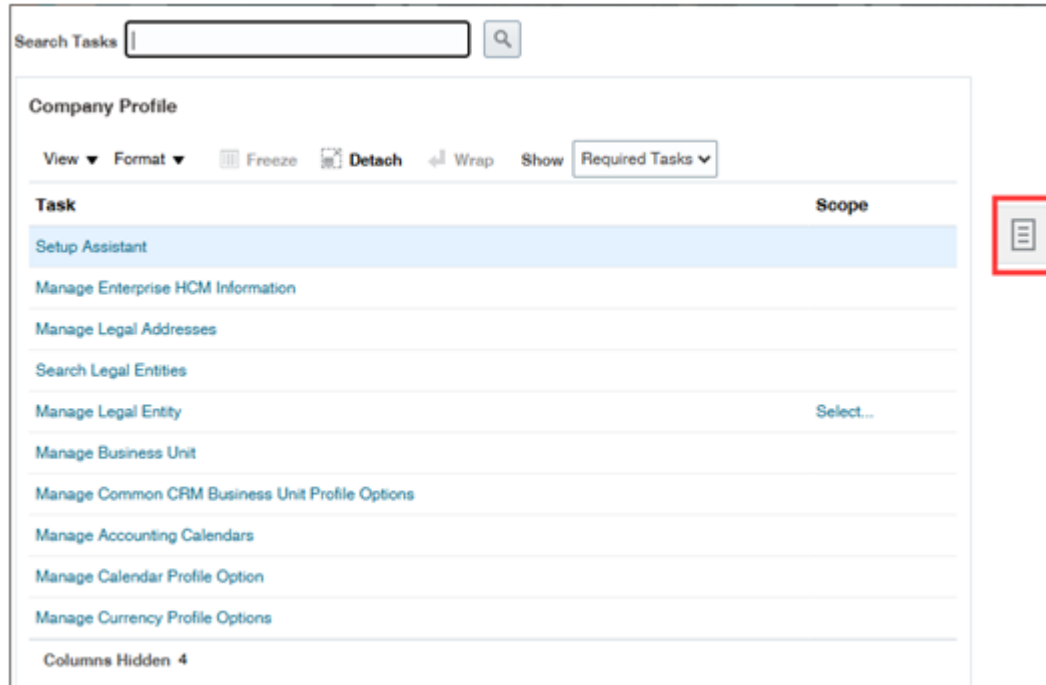
## How can I retrieve a profile option value from an action chain in Oracle Visual Builder Studio?

If the profile option is REST enabled, then you can get the value using the following code: `const poVal = await cxcore.services.profileOptions.getProfileValue(profileOptionName)`. Follow these steps to enable a profile option for REST.



You enable the profile option for REST by adding it to the secure category (ORA\_FND\_AUTH\_REST\_ACCESS). This category gives the profile option AUTH access so the value can be retrieved using the REST endpoint.

1. Open the **Setup and Maintenance** work area.(Navigator > **My Enterprise** > **Setup and Maintenance**)
2. Click the **Tasks** drawer icon.



3. In the drawer, click the **Search** link.
4. Search for the task **Manage Profile Categories** and click the link.
5. In the Manage Profile Categories page, search for the **Category Code ORA\_FND\_AUTH\_REST\_ACCESS**.

6. In the ORA\_FND\_AUTH\_REST\_ACCESS: Profile Options, section, click **New** (the plus sign).

**Manage Profile Categories** ?

Search

Category Code

Category Name

Search Results

Profile Categories

Actions View + ✕

| Category Code            | Category Name                            |
|--------------------------|------------------------------------------|
| ORA_FND_AUTH_REST_ACCESS | Authenticated User Profile Option Values |

ORA\_FND\_AUTH\_REST\_ACCESS: Profile Options

Actions View + ✕

| Display Sequence               | * Profile Name                               |
|--------------------------------|----------------------------------------------|
| <input type="text" value="0"/> | Default Catalog Assignment from Style to SKU |
| <input type="text" value="0"/> | Default Item Organization from Style to SKU  |
| <input type="text" value="0"/> | Default People from Style to SKU             |

7. Search for and select the name of your profile option.
8. Click **Save and Close**.
9. Do a Get to this endpoint: [https://<yourserverhost>/fscmRestApi/resources/11.13.18.05/profileValues/PO\\_ENABLE\\_RCO\\_PWA](https://<yourserverhost>/fscmRestApi/resources/11.13.18.05/profileValues/PO_ENABLE_RCO_PWA).

## Why am I getting an error that tells me I can't use VB Studio because I'm not a member of a VB Studio organization?

A user with the project owner privilege must add you to the existing project. If no projects exist in Oracle Visual Builder Studio, then someone with the Developer Administrator role must create the VB Studio project and add members to it.

## How do I enable the Generate Account Description smart action?

You can use Generative AI to generate account descriptions from .PDF documents by enabling the **Generate Account Description** smart action. For example you might want a summary of a financial disclosure document to help with account planning activities. From the Account details page type **Generate Account Description** in the Action Bar.

If there's already a description, then this action opens a drawer which displays the account description. If there's no description to display, then you can choose to upload a document of your choice.

You must enable the smart action to use this feature from the Action Bar in Oracle Sales. Before you start, ensure you've the **Use Generative AI Features in Sales** feature enabled.

Here's how to enable the Generate Account Description smart action:

1. Click **Navigator > Configuration > Sandboxes**.
2. On the Sandboxes page, click **Create Sandbox**.
3. In the **All Tools** section, select **Application Composer**.
4. In Application Composer, click **Smart Actions**, available from the Common Setup.
5. In the search box, search for **Generate Account Description** smart action.
6. In the Enabled column, select **Yes** to enable the smart action.
7. Test and then publish the sandbox.

By default, the account description generated by the smart action is saved in the **Description** field. If you're using the Description field for other purpose, you can change the layout to reference a different field such as a custom long text field.

When you upload a document to an Account, the document is saved as an attachment to the account. When you delete the document within the drawer that displays when generating an account description from the smart action, it doesn't delete the corresponding attachment. If required, you can delete the attachment from the Attachments subview area.

If you don't select a document when generating an account description, the feature then generates an account description based on the LLMs knowledge of an account which maybe dated or inaccurate. So, with any generative AI feature, please verify the content generated for accuracy and correctness.

## Where can I view Team and Territory members associated with my Lead in Oracle Sales?

From the Team foldout panel for Leads (and Accounts and Opportunities), you can view details for a combination of all team members and territory team members associated with a Lead.

For example, for each member (resource) of the combined lead and territory team, the following information is displayed:

- Image or Initials of the resource
- First and last name

- Email address link which opens your default mail application with the resource email address populated in the **To** field

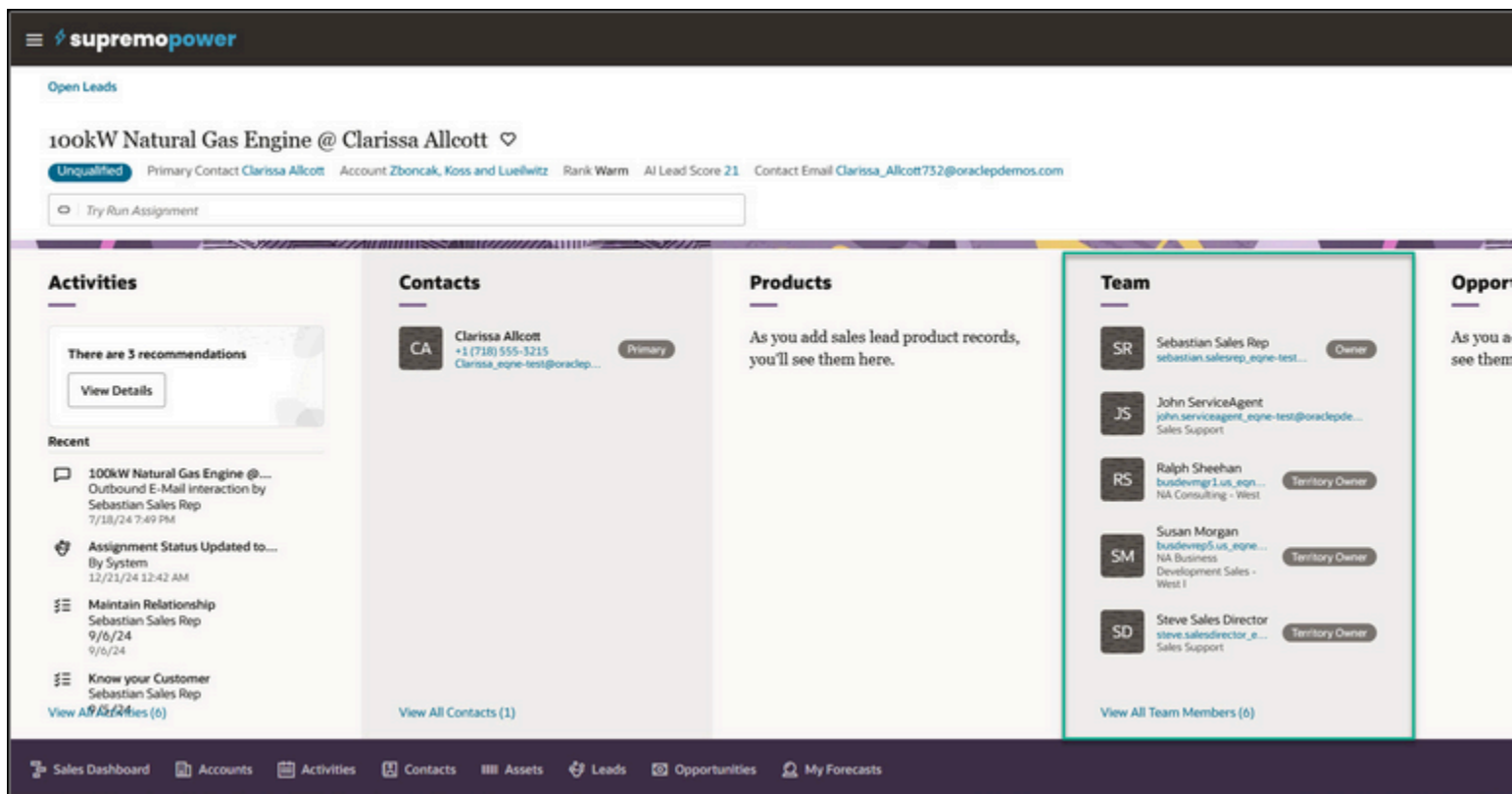
If you send an email (via the email link), an entry is automatically recorded in the activity feed for the lead, opportunity, or account. For example, from the Activities panel, you can review email exchanges, notes, call logs, past and future tasks and appointments, as well as recent updates to your lead record.

- Resource Role/Function, Territory Name, Type, Owner and other details to suit your requirements.

You can use Visual Builder Studio to expose and change the resource, team and territories information shown in the team foldout panel and page.

- City, State, Country (code)

Here's a sample screenshot of the Team detail page configured to include some combined territory and opportunity information for an opportunity when you click **View All Team** from the Team foldout panel.



### Related Topics

- [How do I add a field to my Opportunity page in the Redwood User Experience using Oracle Visual Builder Studio?](#)

## Can I add custom fields to recurring revenue schedules page in Classic UI?

No. You can't add custom fields to set schedule and manage schedule pages in the recurring schedule area for opportunities in the Classic UI. However, you can add and change predefined fields to the recurring schedules UI. You can also rearrange the frequency values that salespeople can choose from when creating a recurring schedule.

You can enable the following predefined fields in the recurring schedule UI for the classic UI to meet your specific requirements:

- Expected Revenue
- Status
- Win Loss Reason
- Estimated Price
- Best Case
- Worst Case
- Win Probability
- Additional Number 1
- Additional Amount 1
- Additional Text 1
- Additional Text 2

### *Related Topics*

- [How can I enable recurring revenue schedules for Oracle Sales?](#)

## Can I create appointments using routines?

No. There isn't an action in Routines to automatically create appointments because appointment details, such as when to schedule the appointment, the duration of the meeting, who should attend, and so on is unknown.

## How long does history data get stored in the audit tables?

You set the time frame for data storage when you start or stop the audit.

See [Audit Configuration for Business Object Attributes](#) for more information.

For information on which Sales objects you can audit, see [What fields can I audit for Sales?](#).

*Related Topics*

- [Can I purge audit data?](#)

## Can I purge audit data?

No, you can't purge audit data.

*Related Topics*

- [How long does history data get stored in the audit tables?](#)

## How do I add contacts while creating an appointment?

In Oracle Sales in the Redwood User Experience, here's how to add contacts while creating an appointment:

1. Go to: **Activities > Create Appointment**.
2. Create the appointment and continue.
3. Click the **Contacts** tab and enter the contacts.

## How do I set up Visual Builder Studio (VBS) so I can use it to extend my Sales application?

Follow the instructions in the topic [Before You Create an Application Extension](#) topic in the playbook "How do I create an application extension for custom objects in Oracle Visual Builder Studio?". You must ensure that the **Extension ID** field in the VB Studio project used for your Oracle Sales in the Redwood User Experience extension is set to `site_cxsales_Extension`.

Complete VB Studio implementation steps are documented in the [Oracle Cloud Administering Visual Builder Studio](#) guide.

*Related Topics*

- [What do I do if my VB Studio project doesn't have the required Extension ID value of "site-cxsales\\_Extension"?](#)

## Can I change the default order in which activities are displayed in the Activities work area?

No. Oracle Sales in the Redwood User Experience displays activities sorted by relevance: the records with the highest number of hits are listed first. You can't change the way Sort by Relevance sorts the records.

## Does publishing to test in Oracle Visual Builder Studio impact existing production extensions?

Publishing in the test environment only affects the extensions in the test environment. It doesn't impact the extensions in the production environment.

## How do I import subscription data?

You can use import management to create or update Subscription records.

To import Subscription records, perform the following tasks:

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

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

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

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

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Ensure prerequisite setups are done, if applicable.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the CSV file for a successful import.

## Before You Start

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

- You have completed all the prerequisites for importing each attribute in your source data.
- You have all parent records in place before importing child records.

## Select a Unique Identifier for Your Records

To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.

The preferred option for uniquely identifying an object record is through the Public unique identifier. If you're creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with 'Number' and usually visible in the business object's UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Subscription object, the attributes are SubscriptionNumber, ExemptCertificateNumber, and BillToAccountNumber.

## Required Attributes and Validations for Subscription Object

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

| Attribute                | Description                                                        | Prerequisite Setup Task/<br>Import Validations                                   | Creating a Subscription<br>Record | Updating an Existing<br>Subscription Record |
|--------------------------|--------------------------------------------------------------------|----------------------------------------------------------------------------------|-----------------------------------|---------------------------------------------|
| ChargeDefinition         | The definition that indicates the purpose of the charge.           | This must be setup in Fusion Pricing.                                            | Required                          | Not Required                                |
| DefinitionOrganizationId | The item master organization                                       | This must be a valid ORGANIZATION_ID from the HR_ALL_ORGANIZATION_UNITS_F table. | Not required                      | Not required                                |
| PartialPeriodType        | The partial period type. The values might be actual or fixed.      | Lookup: ORA_OSS_PERIOD_TYPE                                                      | Not required                      | Not required                                |
| PartialPeriodStart       | The partial period start. The values might be calendar or service. | Lookup: ORA_OSS_PERIOD_START                                                     | Not required                      | Not required                                |
| SubscriptionId           | The subscription ID                                                | This is automatically generated when the record is created.                      | Not required                      | Not required                                |
| BusinessUnitId           | The business unit ID                                               | This must be a valid business unit ID.                                           | Required                          | Not required                                |



| Attribute             | Description                                    | Prerequisite Setup Task/<br>Import Validations                                                               | Creating a Subscription<br>Record | Updating an Existing<br>Subscription Record |
|-----------------------|------------------------------------------------|--------------------------------------------------------------------------------------------------------------|-----------------------------------|---------------------------------------------|
|                       |                                                |                                                                                                              |                                   |                                             |
| LegalEntityId         | The legal entity ID                            | This must be value record as per GL_LEDGER_LE_V.                                                             | Required                          | Not required                                |
| SubscriptionProfileId | The subscription profile ID                    | This must be a valid subscription profile ID - OSS_SUBSCRIPTION_PROFI                                        | Required                          | Not required                                |
| PrimaryPartyId        | The primary party ID                           | Lookup: HZ_PARTIES                                                                                           | Required                          | Not required                                |
| Currency              | The subscription currency.                     | This must be a valid currency.                                                                               | Required                          | Not required                                |
| Status                | The subscription status                        | This must be ORA_DRAFT or ORA_ACTIVE.                                                                        | Required                          | Not required                                |
| AccountingRuleId      | The accounting rule ID                         | RA_RULES.RULE_ID where TYPE in 'A','ACC_DUR', 'PP_DR_ALL', or 'PP_DR_PP'                                     | Not required                      | Not required                                |
| TransactionTypeName   | The accounts receivables transaction type name | This must be a valid transaction type name as per the RA_CUST_TRX_TYPES_ALL table.                           | Required                          | Not required                                |
| BillToAccountId       | The bill-to account ID                         | HZ_CUST_ACCOUNTS.CUST_ACCOUNT_ID                                                                             | Required                          | Not required                                |
| BillToSiteUseld       | The bill-to site use ID                        | HZ_CUST_SITE_USES_ALL.SITE_USE_ID                                                                            | Required                          | Not required                                |
| SubscriptionNumber    | The subscription number                        | This must be a unique number. It can be an alphanumeric value. This serves as the PUID for the subscription. | Required                          | Required                                    |
| ShipToPartySiteId     | The ship-to part site ID                       | HZ_CUST_SITE_USES_ALL.SITE_USE_ID                                                                            | Not required                      | Not required                                |
| ShipToSite            | The ship-to site                               | HZ_CUST_SITE_USES_ALL.SITE_USE_ID                                                                            | Not required                      | Not required                                |
| PaymentMethod         | The payment method                             | This must be ORA_PURCHASE_ORDER or ORA_WIRE.                                                                 | Not required                      | Not required                                |

| Attribute                    | Description                        | Prerequisite Setup Task/<br>Import Validations                          | Creating a Subscription<br>Record | Updating an Existing<br>Subscription Record |
|------------------------------|------------------------------------|-------------------------------------------------------------------------|-----------------------------------|---------------------------------------------|
| PaymentMethodName            | The payment method name            | This must be Purchase Order or Wire.                                    | Not required                      | Not required                                |
| PaymentTermsName             | The payment terms name             | RA_TERMS_VL.NAME                                                        | Not required                      | Not required                                |
| TaxClassificationCode        | The tax classification code        | LOOKUP_TYPE:<br>ZX_OUTPUT_<br>CLASSIFICATIONS                           | Not required                      | Not required                                |
| TaxClassificationMeaning     | The tax classification meaning     | LOOKUP_TYPE:<br>ZX_OUTPUT_<br>CLASSIFICATIONS                           | Not required                      | Not required                                |
| ExemptCertificateNumber      | The tax exempt certificate number  | ZX_EXEMPTIONS_<br>V.EXEMPT_CERTIFICATE_<br>NUMBER                       | Not required                      | Not required                                |
| ExemptReason                 | The tax exempt reason code         | LOOKUP_TYPE: ZX_<br>EXEMPTION_CONTROL                                   | Not required                      | Not required                                |
| ExemptReasonMeaning          | The tax exempt reason meaning      | LOOKUP_TYPE: ZX_<br>EXEMPTION_CONTROL                                   | Not required                      | Not required                                |
| TaxExemptionHandling         | The tax exemption handling code    | LOOKUP_TYPE: ZX_<br>EXEMPTION_CONTROL                                   | Not required                      | Not required                                |
| TaxExemptionHandlingName     | The tax exemption handling name    | LOOKUP_TYPE: ZX_<br>EXEMPTION_CONTROL                                   | Not required                      | Not required                                |
| DocumentFiscalClassification | The document fiscal classification | ZX_FC_DOCUMENT_<br>FISCAL_<br>V.CLASSIFICATION_CODE                     | Not required                      | Not required                                |
| CustomerAcceptance           | The customer acceptance            | Lookup:<br>ORA_OSS_CUST_ACCEPTAN<br>- Values REQUIRED OR<br>NOTREQUIRED | Not required                      | Not required                                |
| InternalApproval             | The internal approval              | Lookup: ORA_OSS_INT_<br>APPROVAL_OPTIONS                                | Not required                      | Not required                                |
| LayoutTemplate               | The layout template                | This must be a valid layout template setup in the BI publisher.         | Not required                      | Not required                                |
| CommunicationChannel         | The communication channel          | Lookup:<br>ORA_OSS_COMM_CHANNE                                          | Not required                      | Not required                                |

| Attribute                  | Description                                         | Prerequisite Setup Task/<br>Import Validations              | Creating a Subscription<br>Record | Updating an Existing<br>Subscription Record |
|----------------------------|-----------------------------------------------------|-------------------------------------------------------------|-----------------------------------|---------------------------------------------|
|                            |                                                     | - Values EMAIL, OFFLINE,<br>ONLINE, CUSTOM                  |                                   |                                             |
| PrimarySalesPerson         | The primary sales person                            | This must be a valid sales<br>person.                       | Not required                      | Not required                                |
| NegotiationLanguage        | The negotiation language                            | fnl_languages_<br>vl.LANGUAGE_CODE                          | Not required                      | Not required                                |
| QuoteToContactId           | The contact ID to which<br>renewal quote is sent to | This must be a valid contact<br>ID.                         | Not required                      | Not required                                |
| EnableRenewalRemindersFlag | Check box for the enable<br>renewal reminders       | Y or N                                                      | Not required                      | Not required                                |
| RenewalProcess             | Renewal Process                                     | Lookup: ORA_OSS_<br>RENEWAL_TYPE                            | Not required                      | Not required                                |
| CurrencyConversionRate     | The currency conversion<br>rate                     | This must be valid as per<br>GL_DAILY_CONVERSION_<br>TYPES. | Not required                      | Not required                                |
| CurrencyConversionRateType | The currency conversion<br>rate type                | This must be valid as per<br>GL_DAILY_CONVERSION_<br>TYPES. | Not required                      | Not required                                |
| Duration                   | The subscription duration                           | This must be an integer.                                    | Not required                      | Not required                                |
| Period                     | The subscription period                             | This must be a valid value<br>from OSS_TIME_CODE_<br>UNITS. | Not required                      | Not required                                |
| EndDate                    | The end date of the<br>subscription                 | This date must be equal to<br>or later than the start date. | Not required                      | Not required                                |
| CloseReason                | The close reason                                    | Lookup: ORA_OSS_CLOSE_<br>REASONS                           | Not required                      | Not required                                |
| BusinessUnitName           | The business unit name                              | This must be a valid<br>business unit name.                 | Not required                      | Not required                                |
| LegalEntityName            | The legal entity name                               | This must be valid as per<br>the GL_LEDGER_LE_V<br>table.   | Not required                      | Not required                                |
| SubscriptionProfileName    | The subscription profile<br>name                    | This must be a valid<br>subscription profile name.          | Not required                      | Not required                                |

| Attribute                        | Description                                             | Prerequisite Setup Task/<br>Import Validations                                           | Creating a Subscription<br>Record | Updating an Existing<br>Subscription Record |
|----------------------------------|---------------------------------------------------------|------------------------------------------------------------------------------------------|-----------------------------------|---------------------------------------------|
|                                  |                                                         | OSS_SUBSCRIPTION_<br>PROFILE                                                             |                                   |                                             |
| PrimaryPartyName                 | The primary party name                                  | This must be a valid party<br>name.                                                      | Not required                      | Not required                                |
| CurrencyName                     | The name of the<br>subscription currency.               | This must be a valid<br>currency name.                                                   | Not required                      | Not required                                |
| RenewalSubscriptionProfileId     | The renewal subscription<br>profile ID                  | This must be a valid<br>subscription profile ID -<br>OSS_SUBSCRIPTION_PROFI              | Not required                      | Not required                                |
| DefaultLanguage                  | The default language                                    | fnl_languages_<br>vl.LANGUAGE_CODE                                                       | Not required                      | Not required                                |
| GenerateBillingSchedule          | The check box for<br>generating the billing<br>schedule | Must be Y or N                                                                           | Not required                      | Not required                                |
| TransactionType                  | The accounts receivables<br>transaction type            | This must be a valid<br>transaction type as per the<br>RA_CUST_TRX_TYPES_ALL<br>table.   | Not required                      | Not required                                |
| PricingSystem                    | The pricing system                                      | ORA_OSS_FUSION, ORA_<br>OSS_THIRD_PARTY                                                  | Not required                      | Not required                                |
| RenewalCustomerAcceptance        | The renewal customer<br>acceptance                      | This must either<br>be REQUIRED or<br>NOTREQUIRED.                                       | Not required                      | Not required                                |
| RenewalInternalApproval          | The renewal internal<br>approval                        | This must either<br>be REQUIRED or<br>NOTREQUIRED.                                       | Not required                      | Not required                                |
| RenewalPriceAdjustmentBasis      | The renewal price<br>adjustment basis                   | Lookup:<br>ORA_OSS_RNWL_PRICE_AD<br>Value - ORA_NET_PRICE                                | Not required                      | Not required                                |
| RenewalPriceAdjustmentPercentage | The renewal price<br>adjustment percentage              | This must be a positive<br>integer.                                                      | Not required                      | Not required                                |
| RenewalPriceAdjustmentType       | The renewal price<br>adjustment type                    | Lookup:<br>ORA_OSS_RNWL_PRICE_AD<br>Values - ORA_MARKUP,<br>ORA_MARKDOWN,<br>ORA_REPRICE | Not required                      | Not required                                |

| Attribute            | Description                                     | Prerequisite Setup Task/<br>Import Validations                                                   | Creating a Subscription<br>Record | Updating an Existing<br>Subscription Record |
|----------------------|-------------------------------------------------|--------------------------------------------------------------------------------------------------|-----------------------------------|---------------------------------------------|
| UsageCapture         | The usage capture mode for the subscription     | ORA_FUSION, ORA_THIRD_PARTY                                                                      | Not required                      | Not required                                |
| ClosedDate           | The date on which the subscription was closed.  | This date must be later than the start date.                                                     | Not required                      | Not required                                |
| CloseCreditMethod    | The close credit method                         | Lookup: ORA_OSS_CLOSE_CREDIT_METHOD                                                              | Not required                      | Not required                                |
| CancelReason         | The reason for canceling the subscription       | This must be a valid reason. Lookup: ORA_OSS_CANCEL_REASONS                                      | Not required                      | Not required                                |
| CanceledDate         | The date on which the subscription was canceled | This must be between the start date and the end date.                                            | Not required                      | Not required                                |
| BillService          | The bill service code                           | Lookup: ORA_OSS_BILL_SERVICE. Values could be ORA_DO_NOT_BILL, ORA_BILL, or ORA_BILL_ON_RENEWAL. | Not required                      | Not required                                |
| BillServiceName      | The bill service option                         | Lookup: ORA_OSS_BILL_SERVICE. The values might be Do not bill, Bill, or Bill on renewal.         | Not required                      | Not required                                |
| InvoicingRuleId      | The invoicing rule ID                           | RA_RULES.RULE_ID where TYPE ='I'                                                                 | Not required                      | Not required                                |
| InvoicingRuleName    | The invoicing rule name                         | RA_RULES.NAME where TYPE ='I'                                                                    | Not required                      | Not required                                |
| BillingDateCode      | The billing date code                           | Lookup: ORA_OSS_BILLING_DATE                                                                     | Not required                      | Not required                                |
| BillingDateName      | The billing date name                           | Lookup: ORA_OSS_BILLING_DATE                                                                     | Not required                      | Not required                                |
| BillingFrequency     | The billing frequency code                      | oss_time_code_units.user_uom_code                                                                | Not required                      | Not required                                |
| BillingFrequencyName | The billing frequency name                      | oss_time_code_units.user_uom_code                                                                | Not required                      | Not required                                |
| AccountingRuleName   | The accounting rule name                        | RA_RULES.NAME where TYPE in ('A','ACC_DUR', 'PP_DR_ALL','PP_DR_PP')                              | Not required                      | Not required                                |

| Attribute                | Description                        | Prerequisite Setup Task/<br>Import Validations | Creating a Subscription<br>Record | Updating an Existing<br>Subscription Record |
|--------------------------|------------------------------------|------------------------------------------------|-----------------------------------|---------------------------------------------|
|                          |                                    |                                                |                                   |                                             |
| BillingSystem            | The billing system                 | Lookup: ORA_OSS_<br>BILLING_SYSTEM             | Not required                      | Not required                                |
| BillToAccountNumber      | The bill-to account number         | HZ_CUST_<br>ACCOUNTS.ACCOUNT_<br>NUMBER        | Not required                      | Not required                                |
| BillToAccountDescription | The bill-to account<br>description | Lookup: HZ_CUST_<br>ACCOUNTS                   | Not required                      | Not required                                |
| BillToAddress            | The bill-to address                | Lookup: HZ_CUST_SITE_<br>USES_ALL              | Not required                      | Not required                                |
| ShipToParty              | The ship-to party                  | Lookup: HZ_PARTIES                             | Not required                      | Not required                                |
| ShipToPartyName          | The ship-to party name             | Lookup: HZ_PARTIES                             | Not required                      | Not required                                |

You can view the Subscription object along with all its child objects and attributes in the Manage Import Objects page of the Import Management flow. You can find attribute information like type, length, description, and so on, on this page.

**Note:**

- To generate the billing schedule based on your pricing, set the **GenerateBillingSchedule** option to Yes and re-import the Subscription.csv file after all files have been imported. Also, to activate your subscription, you need to re-import the Subscription.csv file after importing all required files.

Before generating the billing schedule through import make sure the imported subscription has charges in product's pricing tab. If there isn't any charge then you need to import the subscription product charge first and then generate the billing schedule.

- You can DELETE records for Subscription management while in DRAFT status.
- To create an included warranty, you need to set the value of **WarrantyYN** to Y. Included warranty can be imported only if the subscription is in Active status.
- To import subscription contracts and supporting documents see Import Your Attachment Data in the Related Topics section. The codes for attachment categories are OSS\_SUBSCRIPTION\_AGREEMENT for supporting documents and OSS\_SUPPORTING\_DOCUMENTS for subscription primary contract attachment.
- You can update usage quantity through import by passing **UsageAcquiredFlag** as Y. Don't pass **ListPrice**, **Amount**, and **UsagePricedFlag** attributes in your CSV file.
- When a Subscription is activated using Import management, the approval rules aren't triggered. You can trigger the approval rules in the UI.

## Create the Source CSV File

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

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

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

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

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

## Create the Import Activity

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

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

## Review the Import Results

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

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

### Related Topics

- [How do I import data?](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [Import Your Attachment Data](#)

## How can I retrieve a profile option value from an action chain in Oracle Visual Builder Studio?

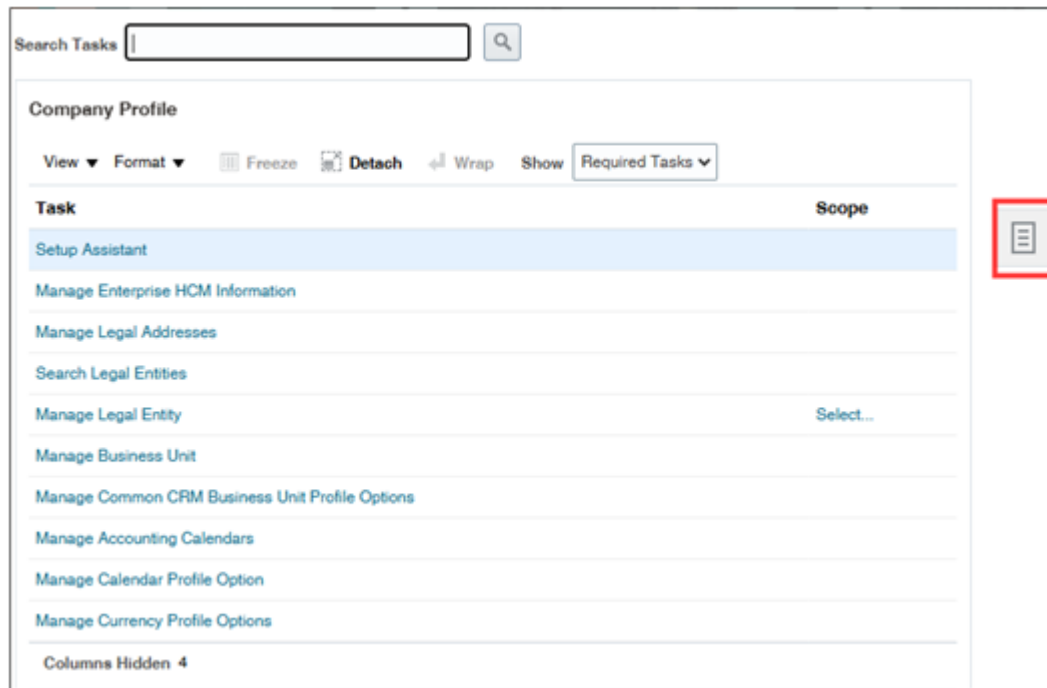
If the profile option is REST enabled, then you can get the value using the following code: `const poVal = await cxcore.services.profileOptions.getProfileValue(profileOptionName)`. Follow these steps to enable a profile option for REST.

You enable the profile option for REST by adding it to the secure category (ORA\_FND\_AUTH\_REST\_ACCESS). This category gives the profile option AUTH access so the value can be retrieved using the REST endpoint.

1. Open the **Setup and Maintenance** work area.(**Navigator > My Enterprise > Setup and Maintenance**)



2. Click the **Tasks** drawer icon.



3. In the drawer, click the **Search** link.
4. Search for the task **Manage Profile Categories** and click the link.
5. In the Manage Profile Categories page, search for the **Category Code ORA\_FND\_AUTH\_REST\_ACCESS**.

6. In the ORA\_FND\_AUTH\_REST\_ACCESS: Profile Options, section, click **New** (the plus sign).

**Manage Profile Categories** ?

Search

Category Code

Category Name

Search Results

Profile Categories

Actions View + ✕

| Category Code            | Category Name                            |
|--------------------------|------------------------------------------|
| ORA_FND_AUTH_REST_ACCESS | Authenticated User Profile Option Values |

ORA\_FND\_AUTH\_REST\_ACCESS: Profile Options

Actions View + ✕

| Display Sequence               | * Profile Name                               |
|--------------------------------|----------------------------------------------|
| <input type="text" value="0"/> | Default Catalog Assignment from Style to SKU |
| <input type="text" value="0"/> | Default Item Organization from Style to SKU  |
| <input type="text" value="0"/> | Default People from Style to SKU             |

7. Search for and select the name of your profile option.
8. Click **Save and Close**.
9. Do a Get to this endpoint: [https://<yourserverhost>/fscmRestApi/resources/11.13.18.05/profileValues/PO\\_ENABLE\\_RCO\\_PWA](https://<yourserverhost>/fscmRestApi/resources/11.13.18.05/profileValues/PO_ENABLE_RCO_PWA).

## Why am I getting an error that tells me I can't use VB Studio because I'm not a member of a VB Studio organization?

A user with the project owner privilege must add you to the existing project. If no projects exist in Oracle Visual Builder Studio, then someone with the Developer Administrator role must create the VB Studio project and add members to it.

## How do I enable the Generate Account Description smart action?

You can use Generative AI to generate account descriptions from .PDF documents by enabling the **Generate Account Description** smart action. For example you might want a summary of a financial disclosure document to help with account planning activities. From the Account details page type **Generate Account Description** in the Action Bar.

If there's already a description, then this action opens a drawer which displays the account description. If there's no description to display, then you can choose to upload a document of your choice.

You must enable the smart action to use this feature from the Action Bar in Oracle Sales. Before you start, ensure you've the **Use Generative AI Features in Sales** feature enabled.

Here's how to enable the Generate Account Description smart action:

1. Click **Navigator > Configuration > Sandboxes**.
2. On the Sandboxes page, click **Create Sandbox**.
3. In the **All Tools** section, select **Application Composer**.
4. In Application Composer, click **Smart Actions**, available from the Common Setup.
5. In the search box, search for **Generate Account Description** smart action.
6. In the Enabled column, select **Yes** to enable the smart action.
7. Test and then publish the sandbox.

By default, the account description generated by the smart action is saved in the **Description** field. If you're using the Description field for other purpose, you can change the layout to reference a different field such as a custom long text field.

When you upload a document to an Account, the document is saved as an attachment to the account. When you delete the document within the drawer that displays when generating an account description from the smart action, it doesn't delete the corresponding attachment. If required, you can delete the attachment from the Attachments subview area.

If you don't select a document when generating an account description, the feature then generates an account description based on the LLMs knowledge of an account which maybe dated or inaccurate. So, with any generative AI feature, please verify the content generated for accuracy and correctness.

## Where can I view Team and Territory members associated with my Lead in Oracle Sales?

From the Team foldout panel for Leads (and Accounts and Opportunities), you can view details for a combination of all team members and territory team members associated with a Lead.

For example, for each member (resource) of the combined lead and territory team, the following information is displayed:

- Image or Initials of the resource
- First and last name

- Email address link which opens your default mail application with the resource email address populated in the **To** field

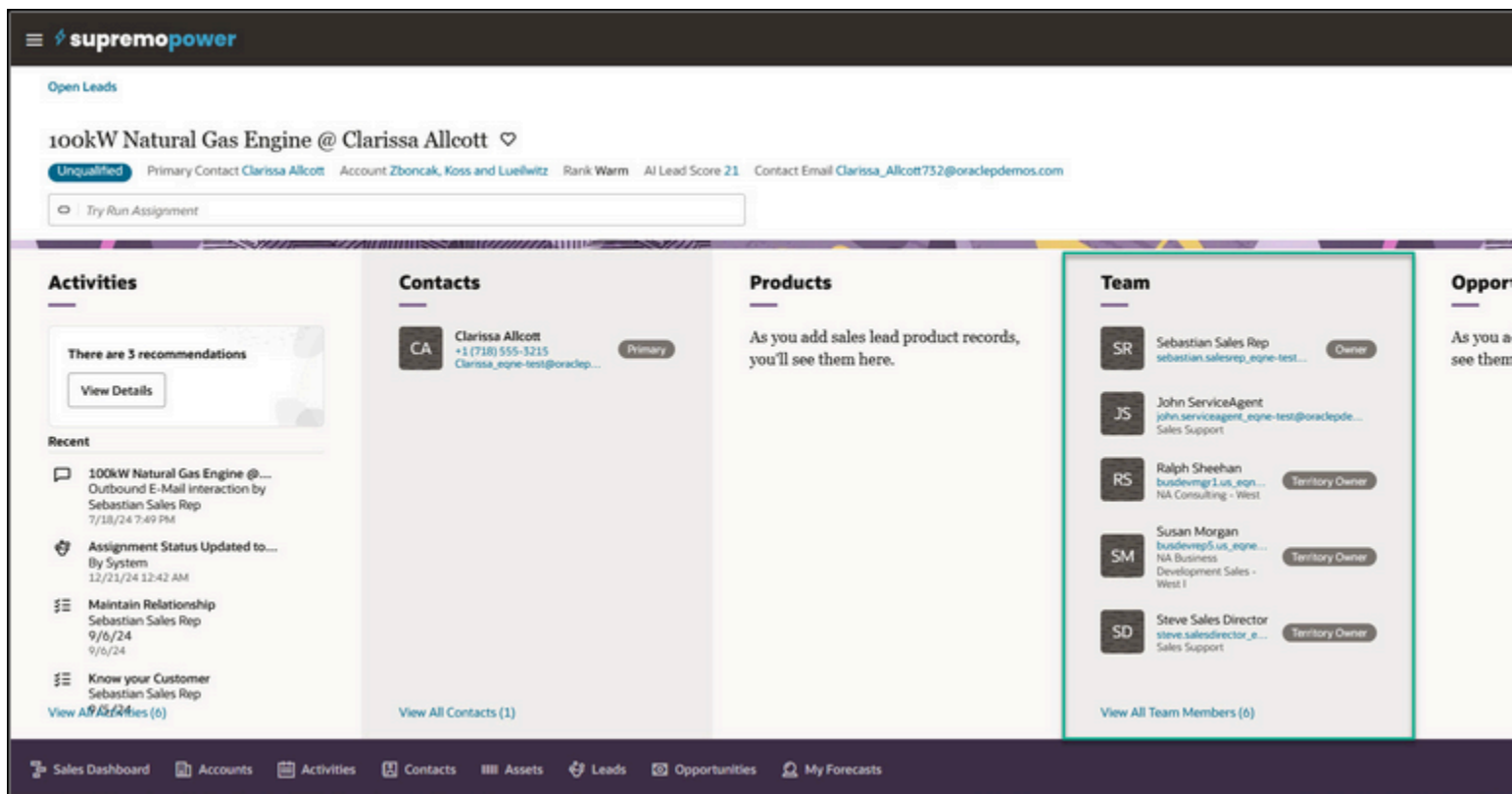
If you send an email (via the email link), an entry is automatically recorded in the activity feed for the lead, opportunity, or account. For example, from the Activities panel, you can review email exchanges, notes, call logs, past and future tasks and appointments, as well as recent updates to your lead record.

- Resource Role/Function, Territory Name, Type, Owner and other details to suit your requirements.

You can use Visual Builder Studio to expose and change the resource, team and territories information shown in the team foldout panel and page.

- City, State, Country (code)

Here's a sample screenshot of the Team detail page configured to include some combined territory and opportunity information for an opportunity when you click **View All Team** from the Team foldout panel.



### Related Topics

- [How do I add a field to my Opportunity page in the Redwood User Experience using Oracle Visual Builder Studio?](#)

## Can I add custom fields to recurring revenue schedules page in Classic UI?

No. You can't add custom fields to set schedule and manage schedule pages in the recurring schedule area for opportunities in the Classic UI. However, you can add and change predefined fields to the recurring schedules UI. You can also rearrange the frequency values that salespeople can choose from when creating a recurring schedule.

You can enable the following predefined fields in the recurring schedule UI for the classic UI to meet your specific requirements:

- Expected Revenue
- Status
- Win Loss Reason
- Estimated Price
- Best Case
- Worst Case
- Win Probability
- Additional Number 1
- Additional Amount 1
- Additional Text 1
- Additional Text 2

### *Related Topics*

- [How can I enable recurring revenue schedules for Oracle Sales?](#)

## Can I create appointments using routines?

No. There isn't an action in Routines to automatically create appointments because appointment details, such as when to schedule the appointment, the duration of the meeting, who should attend, and so on is unknown.

## How do I update Reporting Manager in users and roles?

Resource information is related to CRM (Sales) and not related to person management.

You can update the Reporting manager in the following ways:

- Resource Directory Screen
- Manage Users (Users and Roles)

- Import Management
- REST API

## What can I do with the View Trading Community Common Setup (HZ\_VIEW\_TRADING\_COMMUNITY\_COMMON\_SETUP\_PRIV) and View Trading Community Location (HZ\_VIEW\_TRADING\_COMMUNITY\_LOCATION\_PRIV) privileges?

The View Trading Community Common Setup (HZ\_VIEW\_TRADING\_COMMUNITY\_COMMON\_SETUP\_PRIV) and the View Trading Community Location (HZ\_VIEW\_TRADING\_COMMUNITY\_LOCATION\_PRIV) privileges are added to roles for Redwood functionality to work.

- View Trading Community Location privilege:  
This privilege lets you manage the creation and maintenance of sales organizations and consumers for partners.  
Additionally, it lets you view opportunities and opportunity revenue, review sales leads and appointments, interactions, and customer contacts. This privilege has limited access to customers and contacts.
- View Trading Community Common Setup privilege:  
This privilege lets you configure Oracle Fusion Global Human Resources application and has access to all duty roles necessary to implement the Compensation, Workforce Deployment, and Workforce Development offerings.

## Can I change the clause title on my contract after a clause is approved?

While you can't change the entry you make in the **Clause Title** field after a clause is approved, you can change the title that's printed in contracts in later versions by making an entry in the **Display Title** field.

The display title overrides the original title in contracts. Suppose you want to change the title of the clause `Liability to Limited Liability`, but the clause is already approved and in use.

In this case, you can do the following:

- Create a new clause version.
- Enter `Limited Liability` in the **Display Title** field.

- Submit the new version for approval.

Contract authors can start using the new version of the clause. See the *Implementing Enterprise Contracts* guide for more information about setting up Oracle Enterprise Contracts, configuring the required common application features, and summarizing specific setup tasks for Enterprise Contracts.

## Can I change the default My Calls to Log saved search on Mobile?

No, for the My Calls to Log saved search, which is set up using the Review Calls to Log card, you can't change the default saved search.

## Can I disable access for a user used only for integration purposes or API calls?

No, you can't disable access for a user you're using as an integration purposes or to make API calls. All Oracle Redwood UIs use the same REST calls as you'd use for integration, so the idea of a UI user vs an integration user is functionally the same scope.

## Can I access display labels of fields programmatically in Mobile scripts?

No, display label access isn't available in the Oracle CX Sales Mobile script composer. The reason they're not available is that labels can change based on the device language, and this could cause problems in scripts.

## Can I set up a Service catalog after I've already created the root group in Sales?

Yes, you can. The building blocks of the 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 (Oracle CPQ). 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 Product Information Management (also called PIM or the 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 and serviced in Sales and Fusion Service.

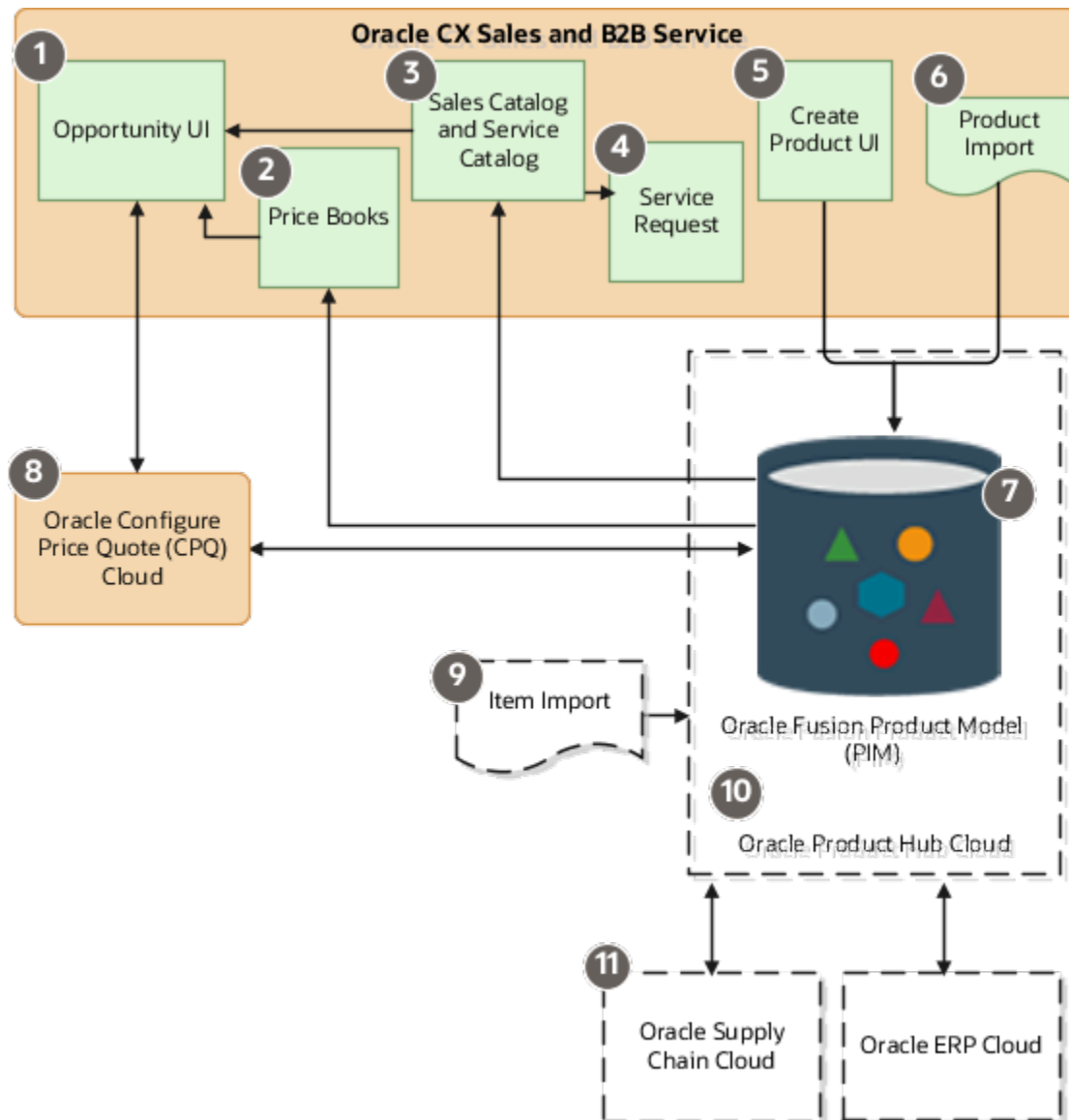
The Product Model, which is included with the different cloud services, provides basic functionality for use in the front-office cloud services. If you're implementing Oracle Supply Chain Management (SCM) or other Oracle ERP cloud services together with your sales application, then you must license the 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 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 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 Opportunities 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 CPQ (callout 8). Price books and Oracle CPQ 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 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 SCM or ERP (callout 11), you must use the Oracle Product Cloud Hub UI and item import (callout 9).



## Can I modify the search-related fields on the Change History subtab?

No, you can't modify the search fields. You can't hide them or configure what they display by default. For example, you can't change the default Date from the predefined 7 days that shows when you first open the UI.

## Can I add field display labels for list and summary views in Mobile?

For list views in CX Sales Mobile, you can't display field labels along with the values. The layout is designed so that it displays enough data to identify the record. In addition, only fields that are familiar to salespeople are used in the list view and thus field labels aren't needed.

For summary views in CX Sales Mobile, whether field labels display along with values depends on which section the field is in. Only the Info 1 column and Info 2 column sections on the summary view display field labels with values. Other sections, such as the Information section, don't display field labels with values.

Here's an example of the summary view layout for Opportunity, where the two fields in the Information section display without field labels. The fields in the Info 2 column and Info 2 column sections do display with field labels.

**Information** ↓

Account

Amount

+ Add Field

**INFO 2 COLUMN** ↑ ↓

|                   |                           |
|-------------------|---------------------------|
| <b>Close Date</b> | <b>Sales Stage</b>        |
| Test-Value        | 02 - Opportunity          |
| <b>Status</b>     | <b>Include in Fore...</b> |
| Open/Close        | When matches...           |

+ Add Field

**INFO 1 COLUMN** ↑

**Budget Amount**

Test-Value

+ Add Field

## How's Eloqua data synced?

The CX Sales and Eloqua integration give marketers and sales teams control over managing prospects and customers at every stage of the customer lifecycle.

Here's a high level look at a typical data flow:

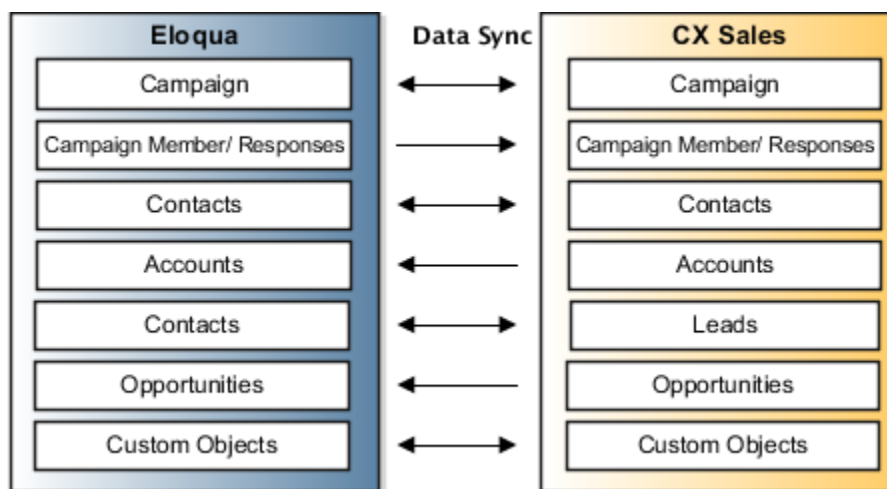
1. A visitor comes to your company's website and fills out a form.
2. Eloqua creates a prospect record.

3. Once Eloqua qualifies the prospect, marketers assign it to a sales user or queue, which creates a new lead in CX Sales and starts the sales cycle.
4. Updates to the lead, such as campaign membership, contact conversion, and account and opportunity association, all sync back to the prospect record in Eloqua giving your marketer a complete view of the prospect's status with your organization.
5. When a deal closes, revenue from the opportunity is attributed back to the very first visitor touch point to calculate closed-loop campaign ROI.

Here's how data is synchronized:

From CX Sales to Eloqua: accounts, contacts, lead historical data, and opportunities are synchronized from CX Sales to Eloqua, as shown in the following illustration. When a sales account, contact, lead, opportunity record is synchronized to CX Sales, the corresponding record in Eloqua is tagged with the CRM ID of the original CX Sales record.

The sync process from Eloqua to CX Sales includes contact data updates, and lead generation. Leads are created from new prospects in Eloqua and synchronized to the Lead object in CX Sales, as shown in the following illustration:



## Why can't I edit an account even though I'm a member of the access group?

To edit account records when your access is provided through an access group, you need Full access in the access group.

See [Create Custom Object Sharing Rules](#) for more information.

## Does the Microsoft 365 integration support multiple domains?

Both the classic Oracle Sales and the newer Oracle Sales in the Redwood User Experience Microsoft add-ins support the use of multi-tenancy setups.

For more information, see [Use Multi-Tenancy](#) in the [How do I implement Microsoft 365 for Oracle Sales Redwood UX?](#) playbook on the [Oracle Sales Help Center > Playbooks](#) page.

## How do the applications handle special characters and non-English characters?

Any character you enter into an Oracle application is stored in unicode.

## How can I restrict data visibility in Sales?

Use access groups and create an object sharing rule to restrict data to specific users in Sales. See [How do I create and manage access groups?](#) to get started.

## How can I see user sign-in information?

To see user sign-in information, there are a couple of reports and a BI subject area you can use.

See this topic for more information: [What user reports are there?](#).

## Is there a permission that lets users modify change history?

No, there's no permission that would let users modify the change history.

The data in the audit tables can't be changed using a permission. The values are captured on the transaction boundary and are read-only regardless of role/privilege.

### *Related Topics*

- [What fields can I audit for Sales?](#)
- [How do I view audit reports?](#)
- [Can I see change history for Oracle Sales in the Redwood User Experience?](#)

## Can I set a specific page to appear when I sign in?

No, you can't specify a certain landing page when you sign in. For example, you can't default the Leads, or any specific application page, to be the entry point on login.

This is because for many customers, Oracle Fusion is a multi-pillar system providing HCM talent management, payroll, sales, service, finance applications, and more. Therefore, you enter through the home page with the application icons.

With the Redwood User Experience version of the application, a user can bookmark the Leads list page.

Perhaps even better, users can bookmark the Sales Dashboard page that gives overviews of a sales team's to-do list and pipeline. On the dashboard, Sales team members and managers can review items that need immediate attention, such as upcoming appointments and overdue tasks. From the dashboard, a salesperson can drill-down into individual items, view all items by clicking View All, and take actions using the Actions menu.

For more information on the Sales Dashboard, see [Overview of the Sales Dashboard in the Redwood UX](#).

## How do we get the management hierarchy for a user?

You can get the management hierarchy for a user by setting the RecordSet filter to 'ORA\_MYMANAGERANDPEERS'. You need to make multiple API calls to get the results for the specific user as follows:

1. "Get all" the resource users using:

```
https://servername.fa.us2.oraclecloud.com/crmRestApi/resources/11.13.18.05/resourceUsers
```

### Response Body

```
{
 "items": [
 {
 "ResourceProfileId": 300100173505525,
 "PartyName": "autouisadminchat38 svc",
 "LastUpdateDate": "2018-12-03T22:57:27.447+00:00",
 "LastUpdatedBy": "FUSION",
 "CreationDate": "2018-12-03T22:57:18.527+00:00",
 "CreatedBy": "FUSION",
 "ResourceType": "INDIVIDUAL",
 "FormattedAddress": null,
 "TimezoneCode": null,
 "Username": "autouisadminchat38",
 "City": null,
 "Country": null,
 "PostalCode": null,
 "UpdateFlag": "true",
 "DeleteFlag": "false",
 "ResourceOrgRoleCode": null,
 "ResourceOrgRoleName": null,
 "FirstName": "autouisadminchat38",
 "LastName": "svc",
 }
]
}
```

```

 "MiddleName": null,
 "Title": null,
 "ResourcePartyNumber": "CDRM_828596",
 "State": null,
 "ResourceEmail": "autouisadminchat38.svc@oracle.com",
 "WorkPhoneCountryCode": null,
 "RawWorkPhoneNumber": null,
 "MobilePhoneCountryCode": null,
 "RawMobilePhoneNumber": null,
 "FaxCountryCode": null,
 "RawFaxNumber": null,
 "AddressLine1": null,
 "AddressLine2": null,
 "ResourceStartDate": "2018-12-03",
 "ResourceEndDate": "4712-12-31",
 "ResourcePartyId": 300100173505516,
 "ResourceOrganizationName": null,
 "ResourceOrganizationUsage": null,
 "ResourceOrgMemRoleEndDate": null,
 "ResourceParentOrganizationName": null,
 "ResourceOrgManagerEmail": null,
 "ResourceManagerName": null,
 "ResourceManagerFirstName": null,
 "ResourceManagerLastName": null,
 "HRManagerEmailAddress": null,
 "HireDate": "2018-12-03",
 "ResourceOrgMemRoleStartDate": null,
 "IndividualRoleCode": "SALES ADMINISTRATOR",
 "IndividualRoleStartDate": "2018-12-03",
 "IndividualRoleEndDate": "4712-12-31",
 "ResourceManagerPartyNumber": null,
 "County": null,
 "Province": null,
 "ResourceManagerPartyId": null,
 "TopResourceFlag": null,
 "PersonNumber": "955160008191324",
 "BusinessUnit": "Vision Financial Services (USA)",
 "LegalEntity": "Vision Corp - Canada",
 "JobCode": null,
 "JobTitle": null,
 "UserStatus": "A",
 "PersonType": "EMP",
 "CreateUserAccountFlag": null,
 "links": [
 {
 "rel": "self",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resourceUsers/CDRM_828596",
 "name": "resourceUsers",
 "kind": "item",
 "properties": {
 "changeIndicator":
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 }
 },
 {
 "rel": "canonical",
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resources/11.13.18.05/resourceUsers/CDRM_828596",
 "name": "resourceUsers",

```

```

 "kind": "item"
 },
 {
 "rel": "lov",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resourceUsers/CDRM_828596/lov/BusinessUnitLOV",
 "name": "BusinessUnitLOV",
 "kind": "collection"
 },
 {
 "rel": "lov",
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resources/11.13.18.05/resourceUsers/CDRM_828596/lov/LegalEmployerLOV",
 "name": "LegalEmployerLOV",
 "kind": "collection"
 },
 {
 "rel": "lov",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resourceUsers/CDRM_828596/lov/MobilePhoneCountryCodeVA",
 "name": "MobilePhoneCountryCodeVA",
 "kind": "collection"
 },
 {
 "rel": "lov",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resourceUsers/CDRM_828596/lov/ResourceRoleCodeLOV",
 "name": "ResourceRoleCodeLOV",
 "kind": "collection"
 },
 {
 "rel": "lov",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resourceUsers/CDRM_828596/lov/YesNoLookupForTopResourceFlag",
 "name": "YesNoLookupForTopResourceFlag",
 "kind": "collection"
 },
 {
 "rel": "lov",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resourceUsers/CDRM_828596/lov/CreateUserAccountFlagLOV",
 "name": "CreateUserAccountFlagLOV",
 "kind": "collection"
 },
 {
 "rel": "lov",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resourceUsers/CDRM_828596/lov/TimezoneCodeLOV",
 "name": "TimezoneCodeLOV",
 "kind": "collection"
 },
 {
 "rel": "lov",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resourceUsers/CDRM_828596/lov/WorkPhoneCountryCodeVA",
 "name": "WorkPhoneCountryCodeVA",
 "kind": "collection"
 },
 {
 "rel": "lov",

```

```

 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resourceUsers/CDRM_828596/lov/JobCodeLOV",
 "name": "JobCodeLOV",
 "kind": "collection"
 },
 {
 "rel": "lov",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resourceUsers/CDRM_828596/lov/FaxCountryCodeVA",
 "name": "FaxCountryCodeVA",
 "kind": "collection"
 },
 {
 "rel": "lov",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resourceUsers/CDRM_828596/lov/PersonTypeLOV",
 "name": "PersonTypeLOV",
 "kind": "collection"
 },
 {
 "rel": "lov",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resourceUsers/CDRM_828596/lov/TitleLOV",
 "name": "TitleLOV",
 "kind": "collection"
 },
 {
 "rel": "child",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resourceUsers/CDRM_828596/child/ResourceRoleAssign",
 "name": "ResourceRoleAssign",
 "kind": "collection"
 }
]
},
. . .
{
 "ResourceProfileId": 300100149755960,
 "PartyName": "autobucsr6 svc",
 "LastUpdateDate": "2018-03-21T13:13:09.203+00:00",
 "LastUpdatedBy": "FUSION",
 "CreationDate": "2018-03-21T13:09:19.191+00:00",
 "CreatedBy": "FUSION",
 "ResourceType": "INDIVIDUAL",
 "FormattedAddress": null,
 "TimezoneCode": null,
 "Username": "autobucsr6",
 "City": null,
 "Country": null,
 "PostalCode": null,
 "UpdateFlag": "true",
 "DeleteFlag": "false",
 "ResourceOrgRoleCode": "SERVICE_REPRESENTATIVE",
 "ResourceOrgRoleName": "Service Representative",
 "FirstName": "autobucsr6",
 "LastName": "svc",
 "MiddleName": null,
 "Title": null,
 "ResourcePartyNumber": "CDRM_738680",
 "State": null,

```



```
"ResourceEmail": "sendmail-test-discard@oracle.com",
"WorkPhoneCountryCode": null,
"RawWorkPhoneNumber": null,
"MobilePhoneCountryCode": null,
"RawMobilePhoneNumber": null,
"FaxCountryCode": null,
"RawFaxNumber": null,
"AddressLine1": null,
"AddressLine2": null,
"ResourceStartDate": "2018-03-21",
"ResourceEndDate": "4712-12-31",
"ResourcePartyId": 300100149755952,
"ResourceOrganizationName": "CRM Service Organization_6",
"ResourceOrganizationUsage": "RESOURCE_ORGANIZATION",
"ResourceOrgMemRoleEndDate": "4712-12-31",
"ResourceParentOrganizationName": "CRM Service Organization_6",
"ResourceOrgManagerEmail": "sendmail-test-discard@oracle.com",
"ResourceManagerName": "automisrhdmgr1 svc",
"ResourceManagerFirstName": "automisrhdmgr1",
"ResourceManagerLastName": "svc",
"HRManagerEmailAddress": null,
"HireDate": "2018-03-21",
"ResourceOrgMemRoleStartDate": "2018-03-21",
"IndividualRoleCode": "SERVICE REPRESENTATIVE",
"IndividualRoleStartDate": "2018-03-21",
"IndividualRoleEndDate": "4712-12-31",
"ResourceManagerPartyNumber": "CDRM_842731",
"County": null,
"Province": null,
"ResourceManagerPartyId": 300100176773204,
"TopResourceFlag": null,
"PersonNumber": "955160008190113",
"BusinessUnit": "ABC Operations",
"LegalEntity": "Vision Corp - Canada",
"JobCode": null,
"JobTitle": null,
"UserStatus": "A",
"PersonType": "EMP",
"CreateUserAccountFlag": null,
...
```

2. Choose a user who has a value for ResourceOrganizationName and use the "Get a resource" operation to get the PrimaryOrganization details using:

[https://servername.fa.us2.oraclecloud.com/crmRestApi/resources/11.13.18.05/resources/CDRM\\_738680](https://servername.fa.us2.oraclecloud.com/crmRestApi/resources/11.13.18.05/resources/CDRM_738680)

### Response Body

```
{
 "ResourceProfileId": 300100149755960,
 "PartyId": 300100149755952,
 "PartyName": "autobucsr6 svc",
 "PartyNumber": "CDRM_738680",
 "StartDateActive": "2018-03-21",
 "EndDateActive": "4712-12-31",
 "LastUpdateDate": "2018-03-21T13:13:09.203+00:00",
 "LastUpdatedBy": "FUSION",
 "CreationDate": "2018-03-21T13:09:19.191+00:00",
 "CreatedBy": "FUSION",
 "LastUpdateLogin": "67EBBA3FF5683314E0534280F50A4BB7",
}
```

```

"ResourceType": "INDIVIDUAL",
"PrimaryOrganization": "CRM Service Organization_6",
"EmailAddress": "sendmail-test-discard@oracle.com",
"FormattedAddress": null,
"FormattedPhoneNumber": null,
"Usage": "HR Employee",
"Manager": "automisrhdmgr1 svc",
"Url": null,
"JobMeaning": null,
"Username": "autobucsr6",
"PersonFirstName": "autobucsr6",
"PersonLastName": "svc",
"PersonLastNamePrefix": null,
"PersonMiddleName": null,
"PersonNameSuffix": null,
"PersonPreNameAdjunct": null,
"PersonPreviousLastName": null,
"PersonSecondLastName": null,
"ManagerPartyId": 300100176773204,
"RecordSet": null,
"UpdateFlag": "false",
"DeleteFlag": "false",
"ResourceOrgRoleCode": "SERVICE_REPRESENTATIVE",
"ResourceOrgRoleName": "Service Representative",
"links": [
 {
 "rel": "self",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_738680",
 "name": "resources",
 "kind": "item",
 "properties": {
 "changeIndicator":
"ACED0005737200136A6176612E7574696C2E41727261794C6973747881D21D99C7619D03000149000473697A
 },
 },
 {
 "rel": "canonical",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_738680",
 "name": "resources",
 "kind": "item"
 },
 {
 "rel": "lov",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_738680/lov/SearchFilters",
 "name": "SearchFilters",
 "kind": "collection"
 },
 {
 "rel": "child",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_738680/child/PictureAttachment",
 "name": "PictureAttachment",
 "kind": "collection"
 }
]
}

```

3. Now, use the PrimaryOrganization as query parameter and find all the managers and peers in this organization using:

```
https://servername.fa.us2.oraclecloud.com//crmRestApi/resources/11.13.18.05/resources?
q=PrimaryOrganization=CRM Service Organization_6
```

### Response Body

```
{
 "items": [
 {
 "ResourceProfileId": 300100176801280,
 "PartyId": 300100176801274,
 "PartyName": "automisrhdagent2 svc",
 "PartyNumber": "CDRM 842737",
 "StartDateActive": "2019-03-05",
 "EndDateActive": "4712-12-31",
 "LastUpdateDate": "2020-06-01T14:16:52.021+00:00",
 "LastUpdatedBy": "FUSION_APPS_HCM_SOA_SPML_APPID",
 "CreationDate": "2019-03-05T15:54:54.594+00:00",
 "CreatedBy": "FUSION",
 "LastUpdateLogin": "A4F2BFB6253CFA51E0533DFDF40AA672",
 "ResourceType": "INDIVIDUAL",
 "PrimaryOrganization": "CRM Service Organization_6",
 "EmailAddress": "sendmail-test-discard@oracle.com",
 "FormattedAddress": null,
 "FormattedPhoneNumber": null,
 "Usage": "HR Employee",
 "Manager": "automisrhdmgr1 svc",
 "Url": null,
 "JobMeaning": null,
 "Username": "automisrhdagent2",
 "PersonFirstName": "automisrhdagent2",
 "PersonLastName": "svc",
 "PersonLastNamePrefix": null,
 "PersonMiddleName": null,
 "PersonNameSuffix": null,
 "PersonPreNameAdjunct": null,
 "PersonPreviousLastName": null,
 "PersonSecondLastName": null,
 "ManagerPartyId": 300100176773204,
 "RecordSet": null,
 "UpdateFlag": "false",
 "DeleteFlag": "false",
 "ResourceOrgRoleCode": "SERVICE_ADMINISTRATOR",
 "ResourceOrgRoleName": "Service Administrator",
 "links": [
 {
 "rel": "self",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_842737",
 "name": "resources",
 "kind": "item",
 "properties": {
 "changeIndicator":
"ACED0005737200136A6176612E7574696C2E41727261794C6973747881D21D99C7619D03000149000473697A"
 }
 },
 {
 "rel": "canonical",
```

```

 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_842737",
 "name": "resources",
 "kind": "item"
 },
 {
 "rel": "lov",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_842737/lov/SearchFilters",
 "name": "SearchFilters",
 "kind": "collection"
 },
 {
 "rel": "child",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_842737/child/PictureAttachment",
 "name": "PictureAttachment",
 "kind": "collection"
 }
]
},
{
 "ResourceProfileId": 300100149755960,
 "PartyId": 300100149755952,
 "PartyName": "autobucsr6 svc",
 "PartyNumber": "CDRM_738680",
 "StartDateActive": "2018-03-21",
 "EndDateActive": "4712-12-31",
 "LastUpdateDate": "2018-03-21T13:13:09.203+00:00",
 "LastUpdatedBy": "FUSION",
 "CreationDate": "2018-03-21T13:09:19.191+00:00",
 "CreatedBy": "FUSION",
 "LastUpdateLogin": "67EBBA3FF5683314E0534280F50A4BB7",
 "ResourceType": "INDIVIDUAL",
 "PrimaryOrganization": "CRM Service Organization_6",
 "EmailAddress": "sendmail-test-discard@oracle.com",
 "FormattedAddress": null,
 "FormattedPhoneNumber": null,
 "Usage": "HR Employee",
 "Manager": "automisrhdmgrr1 svc",
 "Url": null,
 "JobMeaning": null,
 "Username": "autobucsr6",
 "PersonFirstName": "autobucsr6",
 "PersonLastName": "svc",
 "PersonLastNamePrefix": null,
 "PersonMiddleName": null,
 "PersonNameSuffix": null,
 "PersonPreNameAdjunct": null,
 "PersonPreviousLastName": null,
 "PersonSecondLastName": null,
 "ManagerPartyId": 300100176773204,
 "RecordSet": null,
 "UpdateFlag": "false",
 "DeleteFlag": "false",
 "ResourceOrgRoleCode": "SERVICE_REPRESENTATIVE",
 "ResourceOrgRoleName": "Service Representative",
 "links": [
 {
 "rel": "self",

```

```

 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_738680",
 "name": "resources",
 "kind": "item",
 "properties": {
 "changeIndicator":
"ACED0005737200136A6176612E7574696C2E41727261794C6973747881D21D99C7619D03000149000473697A
 }
 },
 {
 "rel": "canonical",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_738680",
 "name": "resources",
 "kind": "item"
 },
 {
 "rel": "lov",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_738680/lov/SearchFilters",
 "name": "SearchFilters",
 "kind": "collection"
 },
 {
 "rel": "child",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_738680/child/PictureAttachment",
 "name": "PictureAttachment",
 "kind": "collection"
 }
]
},
{
 "ResourceProfileId": 300100176802970,
 "PartyId": 300100176802964,
 "PartyName": "automisrhdqueue1 svc",
 "PartyNumber": "CDRM_842739",
 "StartDateActive": "2019-03-05",
 "EndDateActive": "4712-12-31",
 "LastUpdateDate": "2020-06-01T14:21:20.022+00:00",
 "LastUpdatedBy": "FUSION_APPS_HCM_SOA_SPML_APPID",
 "CreationDate": "2019-03-05T15:59:43.070+00:00",
 "CreatedBy": "FUSION",
 "LastUpdateLogin": "A5575A8A7BB89D63E0533DFDF40AA2EA",
 "ResourceType": "INDIVIDUAL",
 "PrimaryOrganization": "CRM Service Organization_6",
 "EmailAddress": "sendmail-test-discard@oracle.com",
 "FormattedAddress": null,
 "FormattedPhoneNumber": null,
 "Usage": "HR Employee",
 "Manager": "automisrhdmgr1 svc",
 "Url": null,
 "JobMeaning": null,
 "Username": "automisrhdqueue1",
 "PersonFirstName": "automisrhdqueue1",
 "PersonLastName": "svc",
 "PersonLastNamePrefix": null,
 "PersonMiddleName": null,
 "PersonNameSuffix": null,
 "PersonPreNameAdjunct": null,

```

```

 "PersonPreviousLastName": null,
 "PersonSecondLastName": null,
 "ManagerPartyId": 300100176773204,
 "RecordSet": null,
 "UpdateFlag": "false",
 "DeleteFlag": "false",
 "ResourceOrgRoleCode": "SERVICE_ADMINISTRATOR",
 "ResourceOrgRoleName": "Service Administrator",
 "links": [
 {
 "rel": "self",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_842739",
 "name": "resources",
 "kind": "item",
 "properties": {
 "changeIndicator":
"ACED0005737200136A6176612E7574696C2E41727261794C6973747881D21D99C7619D03000149000473697A
 },
 },
 {
 "rel": "canonical",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_842739",
 "name": "resources",
 "kind": "item"
 },
 {
 "rel": "lov",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_842739/lov/SearchFilters",
 "name": "SearchFilters",
 "kind": "collection"
 },
 {
 "rel": "child",
 "href": "https://servername.fa.us2.oraclecloud.com//crmRestApi/
resources/11.13.18.05/resources/CDRM_842739/child/PictureAttachment",
 "name": "PictureAttachment",
 "kind": "collection"
 }
],
 ...
 },
 ...

```

## How do I disable activity email notification while importing data using import management tool?

You can disable activity email notification by setting the Disable Appointment E-Mail Notification profile option (ZMM\_ACTIVITY\_DISABLE\_EMAIL\_APPT\_NOTIF) to No.

To disable activity email notification:

1. Sign in to Fusion Application as administrator.
2. Go to **Navigator > Setup and Maintenance**.

3. Search for and select the task **Manage Administrator Profile Values**.
4. On the Manage Administrator Profile Values page, search for ZMM\_ACTIVITY\_DISABLE\_EMAIL\_APPT\_NOTIF.
5. Set the profile value to **No** and save it.

## How do I disable the Require Win/Loss Reason field when closing my opportunity?

The Close Opportunity Win/Loss Reason Required profile option (MOO\_CLOSE\_WINLOSS\_REQD) lets you specify whether salespeople must enter a win/loss reason when closing an opportunity. This profile option also applies at the revenue item level.

You can change the default value from Y to N so that salespeople won't have to enter a reason when an opportunity is won or lost.

## What do I do if a custom fixed-choice list (FCL) isn't showing up in the Sales Dashboard?

If you've added a fixed-choice list (FCL) to the Sales Dashboard layout and it's not showing up, then check to see if the FCL field is mapped to the template `/singleSelectFclTemplate`.

Suppose, for example, we've created a Current Stage FCL (CurrentStage\_c) and added it to the Lead layout. Here's how you can fix the mapping:

1. Open the Lead layout in Oracle Visual Builder Studio.
2. Click the JSON tab.
3. Find the Dashboard Layout section `/dashboardLayout`.
4. In the displayProperties section in `/dashboardLayout`, find the attribute. In this example, `currentStage_c`.
5. Add a fieldTemplateMap to the attribute.

```
"/dashboardLayout": { // -----<----- Dashboard Layout entry

 "<some layout name>": { -----<----- New layout created for the table

 "layoutType": "table", ...

 "layout": {

 "displayProperties": [

 {

 attribute 1....

 },

 {

 attribute 2....

 },
```

```
"CurrentStage_c", -----<----- Entry for the new custom attribute

<more attribute entries>

]

},

"usedIn": [

....

],

"fieldTemplateMap": {

... other fieldTemplateMaps.... "CurrentStage_c": "/singleSelectFclTemplate" -----<----- ADD THIS

}

}

}
```

## What kind of documents can I create with the Interview Definition?

You can use the Interview Definitions to create interactive advice, troubleshooting steps, and to collect information.

Here's what you can do after completing the Interviews setup tasks:

1. Design custom intake forms, such as forms to record troubleshooting content, by collecting information from your customers, and then provide interactive guidance.
2. Make these forms available for use to application users.
3. Optionally, embed these forms in Knowledge articles.

For more information about interviews, see [How do I get started with Interviews in Fusion Service](#).

## How can we exclude custom Groovy validations and triggers during execution of merge?

You can add the following Groovy code to exclude validations during execution:

```
def username = adf.context.getSecurityContext()?.getUserName();
if(username!='FUSION_APPS_CRM_ESS_APPID' &&&
username!='fusion_apps_crm_ess_appid' &&&
username!='FUSION_APPS_CRM_SOA_APPID' &&&
username!='fusion_apps_crm_soa_appid')
{
```



}

## What characters could be displayed by the application as delimiters in a phone number?

The most commonly used delimiters in the phone number format are: dash "-" and parenthesis "(" ")".

Sometimes "x" is used as a delimiter between the body of the phone number and the phone extension, if these fields contain expected data or values.

## Are mobile phone number extensions supported in Oracle Sales?

The mobile phone number extensions aren't supported in Oracle Sales.

The mobile extension isn't supported on any UI page of Oracle Sales nor any REST API.

## How do I rename a standard panel in Oracle Sales in the Redwood User Experience?

Use the User Text Interface Tool to change the name on a standard panel. For example, you can change the name of the Product panel to Revenue Lines. For details, see the topic [Modify Text Using User Interface Text Tool](#).

## What's the difference between delete and purge?

In the data management of Oracle applications, delete means the data can be recovered later, while purge means it can't ever be recovered.

## Can I mass delete data other than through import or REST?

No, you can't delete data in bulk except through import or REST. However, when you log a service request to get your environment cloned, you can request it be cloned without the data.

The exception to being able to delete using Import Management or REST web services is that Account object data can't be deleted. It can only be inactivated or purged. See [Can I purge inactive account and contact data?](#).

#### Related Topics

- [What's the difference between delete and purge?](#)

## Can I get my environment cloned without the existing data?

Yes, you can. When you log the service request to get the environment cloned, you can request it be cloned without the data.

## Where can I find the 2025 release schedule for Sales?

The Oracle Fusion Cloud Applications Suite follows a quarterly update schedule to give customers rapid access to innovation, reduce downtime, and facilitate planning. See the [Quarterly updates made easy](#) blog to find out about 2025 release schedules for Sales.

## How can I get a user's resource role using Groovy?

Here's a sample Groovy script that you can use to find a signed-in user's role code:

```
def vo = newView('Resource');
def vc = vo.createViewCriteria()
def vcr = vc.createRow()
def vcil = vcr.ensureCriteriaItem('PartyId')
vcil.setOperator('=')
vcil.setValue(adf.util.getUserPartyId())
vc.insertRow(vcr)
vo.appendViewCriteria(vc)
vo.executeQuery()
def roleIter = vo.first()?.ResourceRoleAssign;

def roleRow;
def roleCode;

while (roleIter.hasNext())
{
 roleRow = roleIter.next();
 roleCode = roleRow?.RoleCode;
}

return roleCode;
```

If you need to end date an assigned resource role in an organization, you can do that using the fields mentioned in the Groovy script and in these fields:

- `ResourceOrg`
- `RoleCode`
- `ResourceOrgMemRoleStartDate`
- `ResourceOrgMemRoleEndDate`

See the [Groovy Scripting Reference](#) for more information on using Groovy scripting.

## What is the base table for Activities?

The base table for activities is `ZMM_ACTIVITIES`. This table stores the core details of activities, such as tasks and appointments, linked to various entities, including contacts.

The relationship between a contact and its related activities is managed using `ZMM_ACT_CONTACTS`. This table links contacts with their related activities. The key fields typically include:

- `CONTACT_ID` : Links to the contact record (`ZCA_CONTACTS` table).
- `ACTIVITY_ID` : Links to the specific activity in the `ZMM_ACTIVITY` table.

For more information see [Tables and Views for Sales and Fusion Service](#).

## How do I import attachments?

You can import attachments associated with any supported object.

### Supported Objects and File Types

The following objects support importing attachments:

- Account
- Activity
- Asset
- Business Plan
- Contact
- Custom Object
- Deal Registration
- Household
- Message
- Objective
- Opportunity

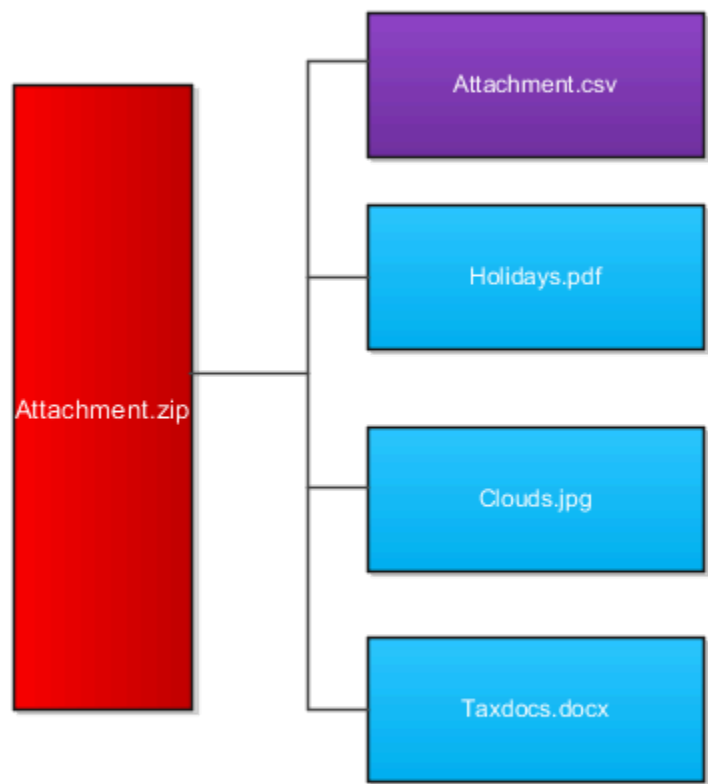
- Opportunity Revenue
- Partner
- Partner Program
- Product
- Sales Lead
- Sales Lead Product
- Service Request

The following file types are supported for attachment files:

- CSV
- DOC
- DOCX
- JPG
- PDF
- PNG
- PPTX
- TIF
- TEXT
- XLSX
- XML
- ZIP

## How to Create ZIP File

To import an attachment, you must create a ZIP file that contains the source data file and optionally one or more attachment files. Make sure you always name the source file as 'Attachment.csv'. You must mention each of the attachment file names in the Attachment.csv file. The Attachment.zip file has the structure shown in the following image:



Here are the examples for the attachment.csv file shown in purple box in the image above:

| Pk1Value        | ObjectPuid | FileName     | Url                   |
|-----------------|------------|--------------|-----------------------|
| 100100004247330 |            |              | http://www.yahoo.com  |
| 100100004247330 |            | Clouds.jpg   |                       |
| 100100004247330 |            | Taxdocs.docx |                       |
|                 | CDRM_6493  |              | http://www.google.com |

| Pk1Value | ObjectPuid | FileName     | Url |
|----------|------------|--------------|-----|
|          |            |              |     |
|          | CDRM_6493  | Holidays.pdf |     |

**Note:**

- Pk1Value and ObjectPuid column values uniquely identify an existing object record. FileName indicates the name of attachment files. Url indicates the value of URL attachment to import.
- The exact file name must exist in the zip file such as Document.pdf
- The attachment ZIP file name can include characters such as parenthesis (), ampersand (&), dots (.), and apostrophe (') only. You shouldn't have more than one period (.) in your attachment name. Also, the rootname.extension shouldn't be more than 80 characters.
- An attachment can only be associated with an existing record of the object. A single record can be associated with multiple attachments by having multiple rows in the CSV file. You can import any number of attachments in an import job, but the ZIP file should not exceed 250 MB in size.
- A record in the CSV file can't have values for both FileName and Url columns. You can pass either the Primary key or the PUID for an object record. If you pass both Primary key and PUID values, then Primary key will be considered and PUID will be ignored.
- The AttachedDocumentId should be left blank.
- The DatabaseTitle shouldn't be higher than 79 character.

## How to Import Attachments

To import attachments:

1. Click **Tools > Import Management**.
2. On the **Manage Imports** page, click **Create Import Activity**.
3. On the Enter Import Options page, enter a name for your import. From the **Object** drop-down list select **Attachments**.
4. In the **Attachment Object** drop-down list that appears, select the object associated with the attachment.
5. Select the ZIP file that you created in the previous section.
6. Click **Next**. On the **Map Fields** page, click the **Apply** button next to the **Import Mapping** drop-down list to map the source and target attributes automatically.
7. Click **Next** to navigate to the **Review and Submit** page.

Review the import activity configuration and click **Submit** to activate the import. The **Manage Imports** page shows the status of the submitted import. The topic Import Data in the related topics section contains more details about the import process.

*Related Topics*

- [How do I import data?](#)

## How do I transfer attachments from one object to another?

You can export the attachments from current object and import them for the other object.

For more information see [How do I import attachments?](#)

*Related Topics*

- [How do I export data?](#)
- [How do I import data?](#)

## Can I create a contract if I'm not defined as a resource?

No. You must be added as a resource before you can create a contract. To identify specific employees, contingent workers, or partner contacts as resources, you must search for them and enable them as resources. You can use the Manage Resources task, Manage Users UI, and the Resource Directory to search persons and identify them as resources. Once you've identified these resources, you can assign them to organizations as required.

If you've an employee who needs to be a sales resource, perform these steps:

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

Next, follow these steps to run the **Synchronize User GUID** process.

1. Navigate to **Tools > Scheduled Processes**.
2. On the Schedule Process window, click **Schedule New Process**.
3. Search for and submit the **Synchronize User GUID** process.

- Related Topics
- [How do I synchronize the GUID of users?](#)

# Why don't I see the search fields when searching for my contract requests?

You must enable the **Configure Adaptive Search** feature in the Sales Offering and do a full publish of the Adaptive Search configuration to view search fields when searching for your contract requests. Once enabled, when you click **Add Filter** from the Contacts Request List page, you can filter your search from a list of predefined search fields.

You can select search fields to refine your search for the requests created by you, or your direct reports and search for requests assigned to you or your resource organization. See the related topics for more information about enabling business objects for Adaptive Search and running a full publish process.

- Related Topics
- [How do I enable business objects for Adaptive Search?](#)
  - [How do I monitor Adaptive Search background processes?](#)
  - [How do I make a field searchable in the UI?](#)

# What can I do when my contract is stuck in Pending Approval status after approval is completed?

A contract status indicates where a contract is in its life cycle, and also governs what actions and operations are allowed for the contract. If the approval process of your contract has completed and you find that the status of the contract is showing as pending approval, then you might want to withdraw the approval from the contract and submit again for approval.

**Note:** Contract statuses are predefined and you can't define new statuses. However, if you've the required privileges, you can define user statuses and their transitions and use them, for example, to pass the contract from one team to another for review before submitting the contract for approval.

Here's a list of the actions available to you for the **Pending Approval** status and the effects that a change causes to the resulting status of the contract.

| Status           | Description                                                                                     | Available Actions and Resulting Statuses                                                |
|------------------|-------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| Pending approval | The status of a contract changes to Pending approval when it's submitted for internal approval. | <ul style="list-style-type: none"><li>• Stop Approval</li></ul> Resulting Status: Draft |



| Status | Description | Available Actions and Resulting Statuses                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|--------|-------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|        |             | <p>The contract is withdrawn from approval. You can now make corrections to the contract and resubmit it for approval.</p> <ul style="list-style-type: none"> <li>Stop Approval</li> </ul> <p>Resulting Status: Under amendment</p> <p>The current contract is in Under amendment status if it has an earlier active version.</p> <ul style="list-style-type: none"> <li>Approve</li> </ul> <p>Resulting status: Active</p> <p>If, based on the contract type, signature isn't required for acceptance, and all approvers have approved.</p> <ul style="list-style-type: none"> <li>Approve</li> </ul> <p>Resulting status: Pending signature</p> <p>If, based on the contract type, signature is required for acceptance.</p> <ul style="list-style-type: none"> <li>Approve</li> </ul> <p>Resulting status: Hold</p> <p>When a contract is approved, if there's an existing Hold on it with Hold date later than the application date, its status changes to Hold.</p> <ul style="list-style-type: none"> <li>Reject</li> </ul> <p>Resulting status: Draft</p> <p>When one or more approvers don't approve the contract.</p> <ul style="list-style-type: none"> <li>Reject</li> </ul> <p>Resulting status: Under amendment</p> <p>This status results when one or more approvers don't approve the contract and the contract has a previous active version.</p> <p><b>Note:</b><br/>The Approve and Reject actions are available from the approval workflow notification.</p> |

## How do I perform assessment of Accounts, Leads, or Opportunities in Oracle Sales in the Redwood User Experience?

You can use the Interviews feature to perform assessment of Accounts, Leads, or Opportunities in Oracle Sales in the Redwood User Experience.

Oracle Sales doesn't have the assessment option as a subtab on the Accounts, Leads, and Opportunities pages.

## What's the maximum number of rows for OTBI analyses?

There's a limit of 65,000 rows for Oracle Transactional Business Intelligence (OTBI) analyses. Exports to Microsoft Excel are limited to 25,000 rows and 50,000 cells.

For more information about analyses limits, see the topic [Analysis and Report Limits](#).

## How do I remove the Create button and action from a custom object list page?

You can remove the Create button and the create action in the list page by removing the create functional privilege from the assigned job role. You can't remove the button or action using Oracle Visual Builder Studio.

When you create a custom object, the application automatically generates the "CREATE <apiNameOfCustomObject> (Workspace)" functional privilege. The privilege is assigned to the Custom Objects Administration (ORA\_CRM\_EXTN\_ROLE) by default, but you can add it or remove it from any job role.

There are two ways of removing the privilege:

- You can enable or disable the privilege using Application Composer.  
You open Application Composer in a sandbox, and, in the Common Setup pane, select the **Role Security** node.  
For details, see the topic [Manage Security by Role](#).
- You can remove the privilege from a custom job role in the Security Console.

The steps are similar to those for removing the button and action from standard objects. For example, see [How do I remove the Create Account button and action on the list page in Oracle Sales in the Redwood User Experience?](#)

## Why is my export job failing with error JBO-25060?

The JBO-25060 error occurs when attempting to export more than 500 records.

It is recommended that when exporting records containing more than 500 items, admin should use Oracle Transactional Business Intelligence (OTBI) instead of the Export to Excel option. OTBI offers superior capabilities for managing larger datasets, ensuring a smoother and more efficient export process.

### *Related Topics*

- [Overview of Oracle Transactional Business Intelligence \(OTBI\)](#)

## How do I hide a party usage in the global search results?

You must configure adaptive search to hide a party usage from being listed in the global search results.

Here's how you configure adaptive search:

1. In the Setup and Maintenance work area, open the Configure Adaptive Search task:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Configure Adaptive Search
2. In the Configure Adaptive Search page, click the **Configure Global Search** tab.
3. Click the object link in the Objects column. For example select Contact.
4. Remove the selection of the **Display in UI** option.
5. Click Save.

## How can I verify what classic Oracle Sales pages apply for my global search configuration?

As part of defining your global search configuration, you enter codes (view IDs) for the applications or pages where you want your configuration to apply.

Here are the steps to verify what pages and applications apply to your global search for classic Sales.

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 global search configuration you created.
  4. Click the **Pages** tab and verify that the following Application View IDs are present:
    - `ORA_FSCM_UIAPP%`
    - `CrmPerformanceApp%`
    - `ORA_CRM_SERVICESAPP%`
    - `ORA_CRM_UIAPP%`
    - `ORA_SERVICEAPP%`
    - `SalesApp%`

You can obtain other codes in Setup and Maintenance, using the Manage Taxonomy Hierarchy task.

5. At the top of the page, select the **Default** option.
6. Click **Save and Close**.
7. Clear your browser cache and navigate to any of the sales pages to test your configuration.

The following is a list of the predefined global search objects:

- Accounts
- Activities
- Assets
- Service Requests
- Work Orders
- Campaigns
- Deal Registrations
- Leads
- Opportunities
- Partners
- Partner Contacts

#### *Related Topics*

- [How do I create and manage saved searches in classic Oracle Sales?](#)
- [Can I disable Global Search for specific roles, such as partner roles?](#)

## How can I see the territories that were created from my resource hierarchy?

When you sign in as a Sales Administrator, you can view territories either in Workspace or in the Territories work area.

## How do I get links for Sales custom objects open in a new tab?

In Oracle Sales in the Redwood User Experience, you must pass the drill-down event property **openInNewTab** with a value of true. This property setting opens a new tab instead of the same tab.

Here's some sample code:

```
"interface": {
 "events": {
 "drillDownPropagation": {
 "payloadType": {
 "drillDownPayload": {
 "id": "string",
 "totalRecords": "number",
 "columnName": "string",
 "puid": "string",
 "openInNewTab": "boolean",
 "records": "object[]",
 "queryName": "string",
 "smartActionId": "string",
 "resourceName": "string",
 "rowIndex": "number",
 "subType": "string"
 }
 }
 }
 }
}
```

## Can the filter values of my saved search be dynamically changed based on the signed-in user?

No, the assigned saved search filter values can't be dynamically changed based on the current signed-in user.

### *Related Topics*

- [Can I set a specific page to appear when I sign in?](#)
- [Can I add a signed-in user as a search filter for resource-based fields?](#)

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

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

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

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

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

## Why am I getting the error "ENOENT: no such file or directory" when publishing a custom object in Oracle Visual Builder Studio?

If you used the CX Extension Generator to create the custom object UI, then you probably created a new extension rather than importing the existing one from VB Studio. You can use the **Create New Extension** button only the first time you configure your application in the environment. You can correct the issue by replacing the existing JavaScript in the gruntfile.js with the following code.

```
'use strict';

/**
 * Visual Builder application build script.
 * For details about the application build and Visual Builder-specific grunt tasks
 * provided by the grunt-vb-build npm dependency, please refer to
 * https://www.oracle.com/pls/topic/lookup?ctx=en/cloud/paas/app-builder-cloud&id=visual-application-build
 */
module.exports = (grunt) => {
 require('load-grunt-tasks')(grunt);
 grunt.initConfig({
 // disable images minification
 "vb-image-minify": {
 options: {
```

```
skip: true,
},
},
// configure requirejs modules bundling
"vb-require-bundle": {
options: {
transpile: false,
minify: true,
emptyPaths: [
"vx/oracle_cx_fragmentsUI/ui/self/resources/js/Utils/contextHelper",
"vx/oracle_cx_fragmentsUI/ui/self/resources/js/Utils/actionsHelper",
"vx/oracle_cx_fragmentsUI/ui/self/resources/js/Utils/callbackHelper",
],
},
},
});
};
```

#### Related Topics

- [Create a New Application Using the CX Extension Generator](#)

## How can I create a link field in Mobile?

Here's an example that shows how to place a hyperlinked field in CX Sales Mobile.

Here are the high-level steps:

1. [Create a formula field as a URL link in Application Composer.](#)
2. [Validate the new link field.](#)

## Create a Formula Field as a URL Link

1. In a sandbox, go to Application Composer and navigate to the object you're adding the link field to.
2. Select **Fields > Create Field > Formula**.
3. Select:
  - Formula Type: **Text**
  - Display Type: **Simple Text Box**
4. Enter the Display Label and click **Next**.
5. Populate the script field with the Groovy script that will give the formula field a default value. Here's an example:

```
def fURL
def rUrl = "https://upsell-stage.oracle.com/web?view=context&customer="
fURL = rUrl + PartyNumber + "&embed=Y&source=ACCT"
return fURL
```

6. Click **Submit**.
7. Navigate to the Mobile App Composer and select the object.
8. Clone the Summary layout and add the Formula field to it.
9. Save your changes.



## Validate the Link Field

1. Sign in to the client and navigate to your field list view.
2. Navigate to the summary page of any of the existing records.
3. You should see the formula field displayed as a link that gets its default value from the Groovy script in the summary view. Clicking on the link should either launch the browser or open the corresponding application.

## How come the creation date added to the Create page doesn't display any value in Oracle Sales in the Redwood User Experience?

In Oracle Sales in the Redwood User Experience, the creation date is added automatically to the list of activities after the record is created. The Redwood UX works differently than classic Oracle Sales. Adding a creation date to the Create page won't display the date.

## How can I restrict salespeople so that they can see only their accounts?

By default, salespeople and sales managers see all accounts and contacts in their organization. However, you can configure the sales application to restrict the view to access based on these conditions:

- The team member is on the account team.
- The team member is the owner or team member of the territory associated with the account.
- The team member is the sales manager (higher in either the resource/territory hierarchy) of those owners/team members.
- For Contacts: The user is a member of the contact team (added manually on a record-by-record basis).

See this article on My Oracle Support for more information: [Customer Accounts and Contacts: Restrict 'All' Access for Sales Reps and Sales Managers \(Configuration\) \(Doc ID 2007815.1\)](#).

After you finish this configuration, you can use access groups to further modify users' access to records. See [How do I create and manage security access groups in CX?](#).

## How do I add top-level and child object records at the same time?

Learn how to add a child record table to the create form for creating a top-level object record. In this video example, we'll use the Contact object with a custom child object defined in Application Composer.

The video shows you how you can add the child records to the create contact form and save them all together.

**Note:** This video assumes you've already set up the standard experience for the custom child record using CX Extension Generator.

Here's the video: [Adding Top-Level Object Records and Child Records at the Same Time](#).

## Why did the original contract that I amended not change status?

When you amend a contract, the status of the original contract isn't updated.

## How do I give view-only access to users in accounts and contacts?

You might want to make it so some users have view-only access in the accounts and contacts screens.

You can achieve this setup by copying their user role and removing, from the copied role, the permissions to create and delete accounts and contacts. As a final step, you create an access group with conditions to grant access that meets the conditions of rules to the users in a rule group.

The privileges to create sales accounts and contacts are:

- Create Sales Account
- Create Sales Party Contact

The privileges to delete sales accounts and contacts are:

- Delete Sales Party
- Delete Sales Party Contact

See the [Security Reference for Sales and Fusion Service](#) guide for more information. Also see the related topics.

### Related Topics

- [How do I create and manage access groups?](#)
- [Copy Job Role and Abstract Role](#)

## How can I make the Sales and Service Access Management work area read-only?

The ability to create, edit, or delete data in the Sales and Service Access Management work area is controlled through the Manage Sales and Service Access functional privilege.

Here are the high-level steps:

1. Copy the predefined IT Security Manager job role and delete the Manage Sales and Service Access functional privilege.
2. Assign the IT Security Manager job role to a user.
3. Run the Send Pending LDAP Requests role sync scheduled process.
4. Test that the user has read-only access in the Sales and Service Access Management work area.

### *Related Topics*

- [What can I use the Security Console for?](#)
- [Why You Should Run the Send Pending LDAP Requests Process](#)
- [Retrieve Latest LDAP Changes](#)
- [Autoprovisioning](#)
- [Synchronize User and Role Information](#)

## Do I need to set up item classes and categories for products if I'm only using Sales?

Yes, even if you haven't licensed the Product Data Hub, you still need to set up item classes and categories for products.

See [Sales Products High-Level Setup Steps](#) and [Item Lifecycle Phases](#) for more information.

## Can I create a custom Edit page instead of using the one CX Extension Generator created for me?

The easiest way is to let CX Extension Generator create the pages for you and then use Oracle Visual Builder Studio to configure the edit page as required.

## What are public unique IDs (PUIDs)?

When users create records, the applications use document sequencing as they generate unique IDs for each business object record in the database. These IDs are known as public unique IDs, or PUIDs. Understandably, these numbers aren't easy to read or use because of their length and complexity. To overcome the issue of long IDs, you can make these IDs more user-friendly and readable during setup.

These PUID are used in:

- The data model
- Unique sequence generation when you use advanced setup
- Global search by PUID attributes

When you integrate your sales application and other, external applications, the sales application can "call" the PUIDs from those other applications. Which application is calling depends on whether an application in the external application is calling the sales application, or whether a person is using their PUIDs.

You specify PUIDs when you create objects. For example, Party\_Number is the PUID for accounts and contacts. When a new account is created, the PUID value can be automatically created by a central routine or supplied by the end user.

See [How do I set up Public Unique IDs \(PUIDs\)?](#) for more information.

## How do I migrate public unique ID (PUID) data?

You can migrate public unique IDs (PUIDs) from a test to production instance, or the other way around.

The migration is essentially exporting the data in one instance using the ready-to-use bulk export process in the sales application and then importing the data into another instance using the import process.

### Select a Migration Approach

Consider the following points before selecting a migration approach:

- If your organization frequently uses the bulk data load (migration) functionality, then use the document sequence approach. For more information, see the related topics.
- If your organization doesn't use the bulk data load frequently, then use Oracle's Import Management to import the data from one instance to another. When PUIDs are rejected in the process, manually define new PUIDs for the rejected PUID values and repeat the import process until all the data is imported. For more information on how to import, see the [Understanding Import and Export Management for Sales and Fusion Service](#) guide.

**Note:** You can't migrate transactional data.

## Manually Override PUID Values

You can manually override the PUID value during the import process. After a PUID is rejected in the import process, a new PUID value should be defined. For example, let's say SMTTXT-002 is rejected because the record already exists in the test instance. So, a new PUID value of SMTTXT-003 is defined and used in the import process.

## Set Up Document Sequencing

Every object team defines a document sequence number for objects as part of PUID implementation. When a new PUID is created in the database, the PUID functionality uptakes the value from the document sequence process. For example, if the document sequence initial value is 0, when a PUID is created in the production instance, then the sequence generation creates the PUID starting from 0. If the document sequence has a different initial value between the test and production instances, then the possibility of PUID clashes between the test and production instance is removed completely.

Organizations know how many objects are typically created in a test instance versus a production instance. Therefore, defining an appropriate initial value for document sequence in the test and production instances should resolve the PUID clashes. For more information about setting up document sequences, see [Set Up Document Sequences](#) in the Oracle Fusion Applications Developer's guide available on [Oracle Help Center](#).

## Maintain Different Prefixes

You define the prefix information for specific objects in the Manage Public Unique Identifier Sequence Generation task in Setup and Maintenance. You can enter a uniquely identifiable prefix in the test instance to signify that the PUID values belong to the test instance. Similarly, while the same objects are defined in the same task flow in the production instance, enter a prefix to signify the PUID values belong to a production instance. Therefore, the PUID value as a whole never clashes when the migration occurs from the test to production instance or the other way around.

### *Related Topics*

- [How do I set up Public Unique IDs \(PUIDs\)?](#)
- [Document Sequences](#)
- [Guidelines for Managing Document Sequences](#)

## How do I set up Public Unique IDs (PUIDs)?

You have three setup options when configuring Public Unique IDs (PUIDs) for your Oracle CX applications.

### Setup Options for Public Unique IDs (PUIDs)

There are three levels of setup options for PUIDs:

- Use the default setup, where no implementation steps are required.
- Use the basic setup, which is configurable to a certain degree. If you use this setup, the default setup isn't used.
- Use an advanced setup which is more complex and configurable. The default and basic setups apply to all objects. Advanced setup is on a per-object basis.

In this topic, we talk about "advanced setup" for PUIDs. This means you set up the unique sequence generation of PUIDs that's a specific prefix and radix configuration. You set these for each business object. In addition, keep in mind that PUID specifications mandate that users can search for all supported business objects by PUID and Party Number.

Here's a list of setup options and where to find more information about the setup.

| Setup Option   | Description                                                                                                                                                                                                                                              | Where to Find More Information                            |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|
| Default Setup  | In this setup, no implementation steps are required. The application automatically generates a unique 15-digit numeric ID for each record. The document sequencing begins with a 1.                                                                      | No additional documentation, other than this introduction |
| Basic Setup    | In this setup, you set two profile options where you configure the radix (or base numbers and characters) and prefix to use. The application generates an alphanumeric public unique ID instead of the default numeric public unique ID for each record. | <a href="#">Public Unique ID Basic Setup section</a>      |
| Advanced Setup | In this setup, you define a radix and prefix for each object. It isn't required for the radix and prefix to be different for each object.                                                                                                                | <a href="#">Public Unique ID Advanced Setup</a>           |

## Public Unique ID Basic Setup

In the basic setup, you define a single prefix that's shared across all business objects in the implementation. In addition, you have several different radix values that can be used. Together these values form the PUIDs.

To perform the basic setup, you set these profile options:

- CRM Public Unique ID String Encoding profile option: Controls the characters used in the encoding of the public unique ID based on a radix, or base number.
- CRM Public Unique ID Prefix profile option (ZCA\_PUID\_PREFIX): Defines the optional prefix value for the public unique ID. If you use this profile option, define the prefix for the public unique ID at the site level. After you set this profile option to the prefix you want, the application inserts the prefix before the public unique ID base encoded document sequence value. For example, you might want the records for the pharmaceutical divisions of your company to be denoted with public unique IDs and the prefix **Pharma** or **Pharma1**, **Pharma2**, and so on. By default, the prefix has no value.
- CRM Public Unique ID String Encoding profile option (ZCA\_PUID\_RADIX): This profile option determines the set of numbers and letters used in creating the public unique ID. The default value is null. After you set the radix, the application converts the public unique ID into user-friendly IDs, using alphanumeric characters instead of numeric digits.

These base values are available when constructing the PUIDs:

- Numbers 0-9, letters A-F
- Letters A-Z, upper case
- Numbers 2-9, letters BCDFGHJKLMNPQRSTVWXYZ
- Numbers 0-9, letters ABCDEFGHJKLMNPQRTUWXY
- Numbers 0-9, letters A-Z, upper case

- Numbers 0-9, letters A-Z, letters a-z
- No alphanumeric conversion

The values for the radix are stored in the lookup type, ZCA\_PUID\_ENCODING. This lookup type is accessible using the Manage Standard Lookups task in Setup and Maintenance.

Keep these points in mind:

- If you enter a prefix value, then you must set a radix value. The length of a prefix value is 5. You can't use the prefix setting by itself.
- If you require a delimiter, then include it as part of the prefix.
- The concatenated public unique ID and prefix must not exceed the defined field length, which is usually 30 characters.

Here's how to set the profile options.

1. Sign in as a setup user and in Setup and Maintenance, go to: **Sales offering > SalesFoundation functional area > Manage Public Unique Identifier Profile Options.**
2. On the Manage Public Unique Identifier Profile Options page, click the ZCA\_PUID\_RADIX option.
3. In the ZCA\_PUID\_RADIX: Profile Values section of the page, click the **Profile Option Values** list of values and select the base numbering value.
4. Click **Save and Close.**
5. Optionally, click the ZCA\_PUID\_PREFIX option.
6. In the ZCA\_PUID\_PREFIX: Profile Values section of the page, in the **Profile Value** box, enter the prefix and the delimiter you want, if any. For example, enter `CDRM_`.
7. Click **Save and Close.**

## Public Unique ID Advanced Setup

In the advanced setup, you can define a different prefix and numbering radix for each business object, for example, Accounts, Contacts, and Opportunities. Oracle recommends that you do this to avoid PUID clashes when populating object records via import while also creating records in the UI or via REST.

Keep these points in mind:

- If you enter a prefix value, you must set a radix value. You can't use the prefix setting by itself. The length of a prefix value is 5.
- If you require a delimiter, then include it as part of the prefix.
- The concatenated public unique ID and prefix must not exceed the defined field length, which is usually 30 characters.

Use these steps to configure the radix and optionally, the prefix in the advanced setup.

1. Sign in as a setup user and in Setup and Maintenance, go to: **Sales offering > SalesFoundation functional area > Manage Public Unique Identifier Sequence Generation.**
2. On the Manage Public Unique Identifier Sequence Generation page, if you're configuring these values for the first time, add a row to the table.
3. In the Object list of values, select the object you're configuring the public unique ID for.
4. In the Radix list of values, select the base numbering to use. This list of possible radix values is the same list of values that are provided in the ZCA\_PUID\_RADIX profile option.
5. In the Prefix box, enter the prefix you want to use for the object and unique ID.

- Enter a maximum of five characters.
  - The allowed characters are: 0-9, A-Z, a-z, and these special characters: period, hyphen, comma, and underscore.
6. Repeat for other objects.
  7. Click **Save and Close**.

This table lists options for RADIX in the Manage Public Unique Identifier Sequence Generation task. For example, the sequence looks as follows if a Lead Number is in the format of "LeadNumber":

- "CDRM\_2452" if the advanced setup for the Lead object isn't set up.
- If the advanced setup for the Lead object is set up, then the LeadNumber is created in the form of "LeadNumber" = "LEAD\_106065".
- PREFIX is LEAD\_ and RADIX is "106065", which is in the format of "No Alphanumeric Conversion".
- RADIX is in the format of "Letters A-Z, Upper Case". "LeadNumber": "LEAD\_GAXM".

| Prefix | Radix                                      |
|--------|--------------------------------------------|
| NULL   | NULL                                       |
| NULL   | Numbers 0-9, letters A-F                   |
| NULL   | Numbers 0-9, letters A-F                   |
| A-     | Numbers 0-9, letters A-F                   |
| A-     | Numbers 0-9, letters A-F                   |
| Null   | No alphanumeric conversion                 |
| A-     | Numbers 0-9, letters A-Z, letters a-z      |
| A-     | Numbers 0-9, letters A-Z upper case        |
| A-     | Numbers 0-9, letters ABCDEFGHJKLMNPQRTUWXY |
| A-     | Numbers 2-9, letters BCDFGHJKLMNPQRSTVWXYZ |
| A-     | Letters A-Z, Upper Case                    |
| A-     | Numbers 0-9, letters A-F                   |

## Oracle CX Business Objects That Support PUIDs

Many of the Oracle CX business objects support PUIDs, as shown in this table:



| Top-Level Object Name                                        | Model Support (PUID Attribute Name)                                                                                                                                 | Object PUID Generation | Global Search By PUID | PUID Exposed in List Management |
|--------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|-----------------------|---------------------------------|
| Account                                                      | PartyNumber (RegistryID)                                                                                                                                            | Supported              | Supported             | Supported                       |
| Action                                                       | ActionNumber                                                                                                                                                        | Supported              | NA                    | NA                              |
| Action Plan                                                  | ActionPlanNumber                                                                                                                                                    | Supported              | NA                    | NA                              |
| Activity                                                     | Activity_Number                                                                                                                                                     | Supported              | Supported             | Supported                       |
| Asset                                                        | AssetNumber                                                                                                                                                         | Supported              | Supported             | Supported                       |
| Business Plans                                               | BusinessPlanNumber                                                                                                                                                  | Supported              | Supported             | Supported                       |
| Campaign                                                     | CampaignNumber                                                                                                                                                      | Supported              | Supported             | Supported                       |
| Competitor (called Sales Competitor in Application Composer) | PartyNumber                                                                                                                                                         | Supported              | Supported             | Supported                       |
| Contact                                                      | PartyNumber (RegistryID)                                                                                                                                            | Supported              | Supported             | Supported                       |
| Custom Objects                                               | Custom Attribute                                                                                                                                                    | Supported              | Supported             | Supported                       |
| Deal Registration                                            | Deal Number                                                                                                                                                         | Supported              | Supported             | Supported                       |
| Interaction                                                  | InteractionNumber                                                                                                                                                   | Supported              | Supported             | Supported                       |
| Lead (called Sales Lead in Application Composer)             | Lead_Number                                                                                                                                                         | Supported              | Supported             | Supported                       |
| MDF Budget, MDF Claim, MDF Claim Settlement, MDF Request     | MDF Claim: Code (ClaimCode)<br><br>MDF Request: Code (FundRequestCode)<br><br>MDF Budget: Code (BudgetCode)<br><br>MDF Claim Settlement: Code (ClaimSettlementCode) | Supported              | Supported             | Supported                       |
| Objective                                                    | ObjectiveNumber                                                                                                                                                     | Supported              | NA                    | NA                              |
| Opportunity                                                  | Opty_Number                                                                                                                                                         | Supported              | Supported             | Supported                       |

| Top-Level Object Name                                                        | Model Support (PUID Attribute Name) | Object PUID Generation | Global Search By PUID | PUID Exposed in List Management |
|------------------------------------------------------------------------------|-------------------------------------|------------------------|-----------------------|---------------------------------|
| Partner                                                                      | Company_Number                      | Supported              | Supported             | Supported                       |
| Quote (called Sales Orders in Application Composer)                          | OrderHeaderNumber                   | Supported              | Supported             | Supported                       |
| Price Book                                                                   | PriceBook_Code                      | Supported              | Supported             | Supported                       |
| Product                                                                      | ItemNumber                          | Supported              | Supported             | Supported                       |
| Product Group                                                                | Reference_Number                    | Supported              | Supported             | NA                              |
| Program Enrollment                                                           | Enrollment Number                   | Supported              | NA                    | Supported                       |
| Promotion                                                                    | Sales Promotion Code                | Supported              | NA                    | Supported                       |
| Resource                                                                     | Party Number                        | Supported              | Supported             | Supported                       |
| Service Request                                                              | SRNumber                            | Supported              | Supported             | Supported                       |
| Template Action Plan                                                         | TemplateName                        | Supported              | NA                    | NA                              |
| Territory (called Sales Territory in Application Composer)                   | Supported (Unique Territory Number) | Supported              | NA                    | Supported                       |
| Territory Proposal (called Sales Territory Proposal in Application Composer) | Supported (Proposal Number)         | Supported              | NA                    | Supported                       |
| Work Order                                                                   | WO_NUMBER                           | Supported              | Supported             | Supported                       |

### Related Topics

- [What are public unique IDs \(PUIDs\)?](#)
- [How do I migrate public unique ID \(PUID\) data?](#)
- [Document Sequences](#)
- [Guidelines for Managing Document Sequences](#)

## How can I use my own product numbers in Sales?

To use your own product numbers in Oracle Sales, you can use the public unique ID (PUID) advanced setup. See [Public Unique ID Advanced Setup](#) for more information.

## What should I do if disabled activity types still appear in the calendar page?

The Calendar page by default shows a legend of the calendar types, with colors. If you've disabled some calendar types and don't want them to appear on the calendar, use Page Composer to hide them.

Here are the steps:

1. Navigate to **Sales > Activities > My Calendar**.
2. Create and enter a sandbox with Page Composer enabled: Click your user name in the global header and select **Edit Pages**.
3. Click the **Select** tab.
4. Scroll to the end of the calendar where the legend is.
5. Click **Edit Component**.
6. In the Component Properties window, deselect the **Show Component** checkbox.

## How can I mass end date members with the Resource role using Import Management?

To end date users with the Resource role, first you need to export the entire resource object so that you have a detailed view of your resources.

See [End Date Resource Role for a User \(Doc ID 2682070.1\)](#) for more information.

### Export the Resource File

Here's how to export the resources to a file:

1. Sign in as a user with the Sales Administrator job role.
2. Navigate to **Export Management** (in the Tools menu).
3. Select **Create Export Activity**.
4. Enter a name for the export job.
5. In the Object field, search for and select the **Resource** object. The File Name field automatically fills with the relevant .zip file.
6. Click **Next**.
7. In the Export Objects area, in the Filter Name column, click the magnifier icon and enter a condition to filter your resources. To capture all files, enter something like `ResourcePartyNumber!=NULL`.

8. In the Resource Attributes pane, select the fields that you want to capture in the export file. At a minimum, select these:
  - First Name
  - IndividualRoleCode
  - IndividualRoleStartDate
  - IndividualRoleEndDate
  - Last Name
  - Membership Role End Date
  - Organization
  - Organization Role Code
  - Organization Membership Role Start Date
  - Party Number
9. Click **Next** and then **Submit**.
10. In the Manage Exports area, wait for the exporting process to finish. After it's finished, click the **My Completed Exports down-arrow**.
11. In the table, click the name of the export and download the .zip file from Actions column.
12. Extract the .csv file from the .zip file and save it to your computer.

## Import the Resources with End Dates

Here's how to import the resources with end dates:

1. Prepare the import file (as a .csv file) and ensure these columns are populated with the appropriate values:
  - ResourcePartyNumber
  - IndividualRoleCode
  - IndividualRoleStartDate
  - IndividualRoleEndDate
2. Navigate to **Import Management** (in the Tools menu).
3. Select **Create Import Activity**.
4. Enter a name for the import job.
5. In the Object field, search for and select the **Resource** object.
6. Browse for the .csv file you saved earlier.
7. In the Map Fields page, ensure the Target Attributes are mapped. If the automatic mapping doesn't recognize all your fields from the source file, click **Save as** and give the Mapping a name.
8. Click **Validate Data**. Fix any validation errors and then close the validation window.
9. Complete the import.
10. Click **Next** and then **Submit**.
11. Verify that the import activity succeeded.

### Related Topics

- [How do I import resource data?](#)

## Should we deploy our extension for Oracle Sales in the Redwood User Experience to test before deploying to production?

Yes. Here are some best practice recommendations.

1. Preview your extension in Oracle Visual Builder Studio. (VB Studio is typically paired with the test environment.)
2. Build (package and deploy) to the test environment so that users can validate the extension without going through VB Studio's preview mode. The package step introduces some optimizations to the code that aren't present in the preview mode.
3. Deploy to production.

As a best practice have a dedicated branch for production builds (package and deploy). You can move the code from the test environment's main branch to this production branch when it passes the second test. This configuration makes it possible for you to move forward in the test environment, while still being able to create an emergency fix for production without including everything in development from the test environment's main branch.

## What's the OTBI subject area I should use to report on Eloqua marketing activities in Oracle Sales?

Use the Sales – CRM Interactions Real Time subject area to create Oracle Transactional Business Intelligence (OTBI) analyses for marketing activities from Oracle Eloqua Marketing Automation Cloud.

## What type of arguments can I pass to a `setOperator()` in Groovy?

Use this topic to understand the arguments you can pass using the standard operators in Groovy.

The types of argument you can pass to a `setOperator()` depends on the method's definition.

You can pass primitive types, objects, custom classes, closures, multiple arguments, varargs, or even named arguments (as a Map). You must verify the method signature to identify the argument type.

## What's the source of values in the Depends On choice list in Application Composer?

Use this topic to understand the source of values in the Depends On list in Application Composer.

The Depends On choice list allows for dynamic recalculations at runtime depending on the changes in another set of data. When you select this field, the values in the list typically includes the fields belonging to the object in context.

To recalculate the value of another field on a different object, you can use the Expression Builder to write a server script. For example, if your expression calculates the value of an employee's annual bonus amount, set the expression to automatically recalculate that amount if the employee's salary changes. For more information, see *Using the Expression Builder and the Depends On Choice List*.

## How do I remove extra spaces from a choice list field using Groovy?

This topic covers how you can use Groovy to trim whitespaces in a choicelist field.

You can use the `trim()` method to remove leading or trailing spaces when iterating the list. For example,

```
// trim email to remove any possible whitespace
for (email in recipientList) {
 def trimmedEmail = email.trim()
 // Do something here with the trimmed email
}
```

## Do the files exported in Export Management get uploaded into Oracle Content Server?

Yes, the exported files are available in Oracle Content Server in `https://<POD_URL>/cs`

You can find the content identifier in the ZCA\_EXP\_JOBS table in the column JOB\_PARAMETERS (EXPORT\_CONTENT\_ID) as follows:

```
select JOB_PARAMETERS from ZCA_EXP_JOBS where EXPORT_JOB_ID=xxx;
```

JOB\_PARAMETERS:

```
;LangIndHeader=NO;;REST_CON_NAME=null;TOTAL_SUCCESS_COUNT=xxx;EXPORT_CONTENT_ID=UCMFAxxxx;ERROR_CONTENT_ID=null;EXPO
```

### Related Topics

- [How can an external user access UCM server? \(Doc ID 2378437.1\)](#)
- [How To See The Files In UCM Added As Attachment In OEC Objects? \(Doc ID 2505663.1\)](#)

## How do I add or update the photo of a resource?

Use the Manage Resource Organization Members task to add or update a photo of a resource.

Here's how to update the photo:

1. In Setup and Maintenance go to:
  - Offering: Sales
  - Functional Area: Users and Security
  - Task: Manage Resource Organization Members
2. In the Manage Resource Organization Members page, search for and select the resource organization that contains the resource that you want to update.
3. Drill down to the resource.
4. Click **Upload Photo** and update the details.
5. Click **Save and Close**.

## What attributes are referenced to populate latitude and longitude during geocoding?

This topic explains geocoding and how to enable this option in the application.

Geocoding is the process of finding latitude and longitude coordinates from geographic data such as street addresses or postal codes. Once these coordinates are available, you can use the spatial services feature to identify points of interest, such as customer and contact addresses, in the vicinity. The application integrates the Geocoding feature with eLocation ([http://elocation.oracle.com/maps\\_oracle\\_dot\\_com\\_main.html](http://elocation.oracle.com/maps_oracle_dot_com_main.html)), which is a Geocoding service provided by Oracle.

**Note:** Geocoding for Hong Kong isn't supported.

By default, the Geocoding option is turned off in the application. You can enable the Geocoding option by going to the Setup and Maintenance work area and performing the following:

- Offering: Customer Data Management
- Functional Area: Enterprise Profile
- Task: Manage Geographies

If the Geocoding feature is enabled, the feature can be scheduled to run at regular time intervals. This ensures that newly created or updated locations are picked up and geocoded whenever you create or update an address using the user interface, web services, bulk import, or using import management.

Related Topics

- [What are Spatial Services?](#)
- [Set Up Geocoding](#)

## How do I enable contact creation audit logs?

You must run the Publish Feed Elements scheduled process to configure the Activities Panel 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.

The Publish Feed Elements process populates activities child objects of all contacts that were updated in the last 300 days:

| Child Object                | Criteria                                                                                                                                                                                    |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activity Type = Appointment | All activities of type Appointment that haven't passed the due date.<br>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.<br>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.                                                                                                      |

## What is the maximum number of addresses that we can store under one contact?

There is a limit to the number of records that can be retrieved and displayed on the UI.

There is no limit to the number of addressed that we can store under one contact. But we can only retrieve and display only 500 records on the UI.



## Why is my Adaptive Search publish process taking a long time to complete?

Click Publish to run the process each time you change your Adaptive Search configuration. Your changes become effective when the process completes. The variations in the time it takes for the successful completion of the publish process is mainly due to the volume of data, the number of objects enabled, and the number of attributes selected for each object.

You must click **Publish** to run the process each time you:

- Make changes on the Setup tab.
- Perform a production to test (P2T) environment refresh

When the full publish job completes successfully, your Adaptive Search configuration becomes the latest active meta model. This ensures that users have the latest features and enhancements and aren't limited in functionality due to an older version of an active meta model being in use.

The recommended schedule for some processes might vary according to your business requirements, existing run assignments, and data load schedules. For example, if you publish more attributes and more objects, then it takes more time to complete the publish and indexing process. You can improve the performance by removing any attributes that you don't want to be indexed. You can also monitor the progress of the publish process. Your configuration is active when the process completes successfully.

**Note:** The Publish process should be completed before running the Periodic refresh process.

### *Related Topics*

- [How do I monitor Adaptive Search background processes?](#)
- [How do I set the time limit to keep indexing updated records in Adaptive Search?](#)
- [What's the impact of increasing the frequency of the Periodic Refresh process for Adaptive Search in Sales?](#)
- [When should I run the Adaptive Search publish process?](#)

## How do I add an OTBI report to the Sales Dashboard in Oracle Sales in the Redwood User Experience?

You can display Oracle Transactional Business Intelligence (OTBI) analyses on the Sales Dashboard by creating a visualization using the Visualization Configuration tool in Application Composer. You then add that visualization to the dashboard. For details see the topic [Create Charts and Tables from OTBI Analyses](#).

## Can I change the font and font size for labels on the details pages in my Oracle Sales in the Redwood User Experience application?

No. Customers can't change the font size on labels on the details pages for the standard sales objects provided with the application. They don't have access to the dynamic form element where you can add the style attribute.

## How can I schedule the synchronization of Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) updates?

You can periodically synchronize your Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) updates, including your previously enriched organization and person records and new records to uptake the latest updated information from D&B.

You can synchronize these records from the Data Enrichment work area, using the Synchronize D&B Updates Oracle Enterprise Scheduler Service job. You can update or synchronize records only if they have a Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) ID assigned to them. In case some records were originally excluded from synchronization in the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) Administrator UI, these records can't be synchronized and updated.

Before you proceed with synchronization process, verify that the data enrichment configurations are complete including any custom import mappings. For more information, see the Related Topics section.

**Note:** Note that a synchronization job updates one million records at a time. If you have more than one million records to update, you must submit the synchronization batch a second time.

Perform the following steps to synchronize your D&B updates:

1. Navigate to the Data Enrichment work area.
2. Click **Actions**.
3. Select Synchronize Organizations or Synchronize Persons. The Schedule Updates for Person or Schedule Updates for Organization page appears.

**Note:** If you have enabled Oracle DataFox integration, you can't create batch data enrichment. For more information on DataFox integration, see the Related Topics section.

4. Click **Advanced** to select batch run options such as 'As soon as possible' or 'Using a schedule'. By default, the batch run is scheduled for 'As soon as possible'.

In the Advanced Option section of the Schedule Updates for Persons or Schedule Updates for Organizations page, you can update the frequency in which you want the batch to run. You can also set a start and end date to the batch schedule.

5. Click **Submit**.
6. Click **OK** in response to the confirmation message.

You can search for the status of scheduled synchronization batches on the Data Enrichment work area. The batch ID contains the link to the Batch Details page. You can download the details of imported (synchronized) and not imported (not synchronized) records by clicking the linked number on the Batch Details table.

**Note:** You can't see the list of records that were excluded from synchronization in the Imported or Not Imported record list.

#### Related Topics

- [Overview of Configuring Data Enrichment](#)
- [Best Practices for Data Enrichment](#)

## How can I create a deep link to a subtab for a custom object in Application Composer?

This topic covers how you create a direct link to a subtab for a custom object.

You can create a direct page link to the default summary tab for a custom object. You can use this direct page link URL pattern `https://<host name>:<port>/<application>/faces/FuseOverview?`

`fndTaskItemNodeId=CRM_CUSTOM_TAB_<XXXX>&fndGlobalItemNodeId=CRM_CUSTOM_CARD_<XXXX>&fnd=%3BsubTabName%253DSUMMARY%253BObjectId%253D<YYYY>%253B%3B%3Bfalse%3B256%3B%3B%3B` as follows:

1. Copy the first part of the URL `https://<host name>:<port>/<application>/faces/FuseOverview?` from the instance's actual home page.
2. Replace XXXX with the custom object's API name using all upper case letters including \_C. For example, `TROUBLETICKET_C`.
3. Obtain the API name from the object's overview page by clicking the object's node in the Custom Objects tree in Application Composer.
4. Replace YYYY with the custom object's primary key in the database.

## Is there a limit on the number of records that a custom object can hold in the Application Composer?

This topic covers the numbers of records that a custom object can hold.

No. There's no limit on the number of records that a custom object can hold. However, the way these records are retrieved by using filters can impact the performance. The extent of the impact could depend on the environment, customizations, and the background processes.

## Can I add more fields to the Attachment object in Application Composer?

This topic covers that you can't add more fields to the Attachment object but you can use the profile options to enable a few fields.

No. The attachment object isn't extendable but you can try using the profile options to enable some fields for entering more information. For example, you can set ZCA\_ATTACHMENT\_ENABLE\_BASIC to **No** to enable **Title** and **Description** fields for the attachments object.

## How to check for duplicates using upper case in Groovy?

This topic covers how you can use `upper()` before checking for duplicate values.

You can convert the values that you're comparing to upper case before checking for duplicates. To filter out case-sensitiveness in the fields, you can use the `upper()` function.

If you're not sure whether the operand value is in uppercase, you can also use the `upper()` function around the operand as follows:

- `upper(JustificationCode) = 'BRK'`
- `upper(JustificationCode) = upper(:codeVar)`
- `upper(JustificationCode) like upper(:codeVar) || '%'`

## How do I change the displayed fields on the Possible Duplicates page of an account?

Use the Application Composer to change the fields on the Possible Duplicates page.

Create a sandbox with Application Composer.

1. Go to **Navigator > Configuration > Application Composer > Sandboxes**.
2. Click Create Sandbox.
3. Specify a name and select Application Composer All Tools. Also select the Publishable option as Yes.
4. Click Create and Enter.
5. Click the Application Composer icon.

6. Click **Standard Objects > Account**.
7. Click **Pages**.
8. Scroll down to Possible Duplicate Page Layouts.
9. Click **Actions > Duplicate**.
10. Provide the required information on the Duplicate Layout popup and click Save and Edit.
11. Make the required changes and click Save and Close.

Publish the sandbox.

## Can I enable the Verify Address button on the account and contact pages of the Oracle Sales in the Redwood User Experience?

We don't have the option to enable the Verify Address button on the account and contact pages of the Oracle Sales in the Redwood User Experience.

You can however verify phone numbers and email addresses automatically after entering the data in the input fields. This is done using Oracle Address, Email, and Phone Verification.

## How do I change the deal registration status from draft to expired?

You can create a routine to update deal registration records from draft to expired:

1. Sign in with the application implementation consultant or sales administrator privileges.
2. On the dashboard, go to **Configuration Application Composer**.
3. From **Common Setup**, click **Routines**.
4. Click **Create Routine**.
5. Enter the name and description. Select **Object** as Deal Registration.
6. Click **Next**.
7. You can specify the trigger as per your requirements and click **Next**.
8. In **Selected Actions**, select:
  - a. **Action Type**- Field Update
  - b. **Attribute**- Expiration Date, **Value**- Run Date.
  - c. Click the Add icon to add another attribute.
  - d. **Attribute**- Status, **Value**- Expired.
9. Click **Next**.
10. In **Rules**, select:
  - a. **Attribute**- Last Updated Date, **Operator**- Since, **Value**- Run Date. You can specify the **Op** and **Value** as per your requirement.
  - b. **Attribute**- Status, **Operator**- Equals, **Value**- Draft.
11. Click **Next** and review the changes.

12. Click **Submit**.

## How do I search using the custom fields on the Partner page?

In the Oracle Redwood Partner Relationship Management, you can search using the custom fields on the Partner lists page. Here are the steps:

1. Go to **Redwood Sales Partners**.
2. Enter the custom field in the Smart Search.

## How do I create duplicate resolution requests?

You create a duplicate resolution request to resolve potential duplicates in the database.

Depending on your business scenarios, you may create duplicate resolution requests using one of the following options:

- Create Duplicate Resolution Requests Manually.
- Create Duplicate Resolution Requests during the Duplicate Identification Flow.

### Create and Process Generic Resolution Requests

You can choose to create a generic duplicate resolution request when not clear whether you want to merge or link the duplicate parties. Specifying a generic resolution request lets you make the merge or link decision later. You have the option of creating generic duplicate resolution requests while:

- Creating duplicate identification batches by selecting the None as the Automatic Processing option on the Create Duplicate Identification Batch page.
- Reviewing duplicate sets and creating single requests for each duplicate set on the Duplicate Identification Batch details page.
- Creating a duplicate resolution request manually for confirmed duplicates on the Create Resolution Request UI page.

You can review these resolution requests on the Duplicate Resolution work area and complete processing them by creating duplicate resolution requests of the type merge or link. For more information, see the How You Process Duplicate Resolution Requests topic.

### Create Duplicate Resolution Requests Manually

When you're sure that two or more records are confirmed duplicates, you can decide to create a duplicate resolution request manually using the following steps:

1. Navigate to the Duplicate Resolution work area as follows: **Navigator > Customer Data Management > Duplicate Resolution**.
2. Click **Tasks** and then click **Create Resolution Request**.

3. Search for the records that you want to merge, link, or test merge. For example, select the Party Type as Person and enter the Name as John, and click Search.

**Note:** You can only search on standard fields using the Advanced Search option. Custom fields of the Accounts or Contacts objects aren't available.

4. Select two or more duplicate records using the Shift or Control key.
5. Click **Actions > Create Request**.
6. Enter a name for the request in the **Create Request: Select Type** dialog.
7. Select the request type as Merge, Link, or Test Merge. You can also select the Master Record, if needed.
8. Click **OK**.

You can also submit request dispatch jobs directly from the Duplicate Resolution work area by clicking the Dispatch button, which will submit the job for immediate processing.

## Create Duplicate Resolution Requests during the Duplicate Identification Flow

You create a duplicate identification batch in the Duplicate Identification work area to identify potential duplicates in the database.

As part of the duplicate identification batch creation flow, you have the option of specifying a duplicate resolution request of an appropriate type, such as merge, link or none, to resolve the identified duplicates. You can also create a duplicate resolution request of type Test Merge to test the merge request configuration without changing your application data. This test option helps you fine-tune your merge request configurations such as survivorship rules and agreement rules.

## How do I create deep links to individual records in Oracle Sales in the Redwood User Experience?

Here's the URL pattern that you can use to create deep links to individual records in Sales in the Redwood UX:

```
https://<hostname:port>/fscmUI/redwood/<application name>/application/container/<object name>/<object name>-detail?id=<id>&puid=<puid>
```

You can obtain the **ID** and the **PUID** values from the URL of the record itself.

Here's an example of a URL for an opportunity:

```
https://<server name>/fscmUI/redwood/cx-sales/application/container/opportunities/opportunities-detail?id=300000009986820&puid=34005
```

Here's an example for a custom object:

```
https://<server name>/fscmUI/redwood/cx-custom/application/container/payment_c/payment_c-detail?id=300000011220859&puid=300000011220859
```

## How can I translate my extensions for Oracle Sales in the Redwood User Experience?

Oracle provides language packs that, when installed, provide the translations to users' preferred languages. For translating extensions, several tools are involved:

- Oracle Visual Builder Studio's Translations pane, supports the translation of UI strings in your extensions, including those imported from CX Extension Generator. For details, see the *Work with Translations* topics in the Extending Oracle Cloud Applications with Visual Builder Studio guide. The *Translate Strings for Redwood UI Extensions video on Oracle Cloud Customer Connect* walks you through an example.
- To translate Smart Action, Field, and Object names that are defined in Application Composer, use the User Interface Text tool in Application Composer. For details, see the topic *Modify Text Using User Interface Text Tool*.
- To translate Sales Methods, Sales Stages, and Message Templates used by Routines and Orchestration you create the initial records in English. You then set your personal language profile to the desired language and edit those same records, replacing the English text with your translations. When you save, you're actually saving the edited text into the language you selected for your session.

You must install the language pack for the language you're translating to ahead of time.

## Can I make a custom object record searchable using its ID in Adaptive Search?

No. You can't make a record ID available for search in Sales in the Redwood User Experience. You can enable the record number for Adaptive Search instead.

## What opportunity statuses determine the value of the Closed Flag in the Sales - CRM Pipeline subject area in OTBI?

The value of the Closed Flag attribute in the Oracle Transactional Business Intelligence (OTBI) Sales - CRM Pipeline subject area is set depending on the opportunity status.

- The value is set to **Y** if the opportunity is in the Won status.
- The value is **N** if the opportunity is in the Open, Lost, or No Sale statuses.



## How do I make the Sales Dashboard the default landing page when users sign in to Oracle Sales in the Redwood User Experience?

Users can bookmark the Sales Dashboard page in their browser. When they select that bookmark, they're prompted to sign in and the Sales Dashboard opens automatically. However, clicking the Home icon in the application always directs them to the home page.

## What setups for custom objects do we have to redo when we transition from classic Sales to the Redwood User Experience?

Most of the work involves recreating custom layouts. The Redwood UX is a completely new user experience, not just a new theme.

The layouts you created in Application Composer for classic Sales remain for use in the classic Sales pages, but you must create new layouts for the Redwood UX using CX Extension Generator and Oracle Visual Builder Studio.

The transition doesn't delete any data. All custom objects and fields, along with data interfaces, remain and are consumed in the Redwood UX.

All custom Groovy scripts remain in place and will run. Field validations triggers that run on tab out of a field in classic Sales, now run on the save operation, when data is sent from the browser to the server.

Email templates, which are mostly used in classic Sales workflows, continue to work as expected in Redwood. Sales in the Redwood UX includes some new features for interactive email authoring that don't exist in classic, so there are more options to use message templates in Sales flows.

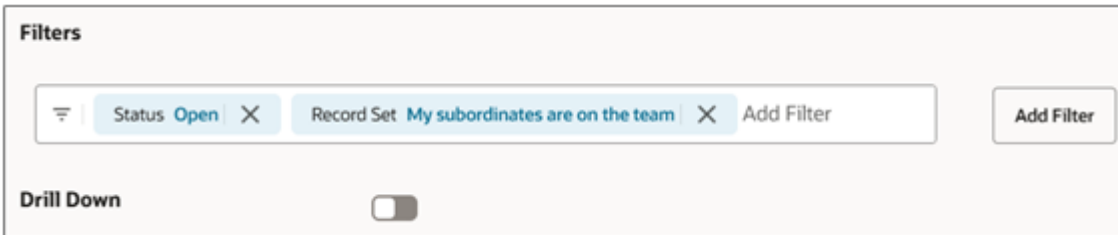
For more information on recreating your layouts, see the [How do I create an application extension for custom objects?](#) playbook.

## Can I add multiple filters to a visualization I create for the Sales Dashboard in the Redwood User Experience?

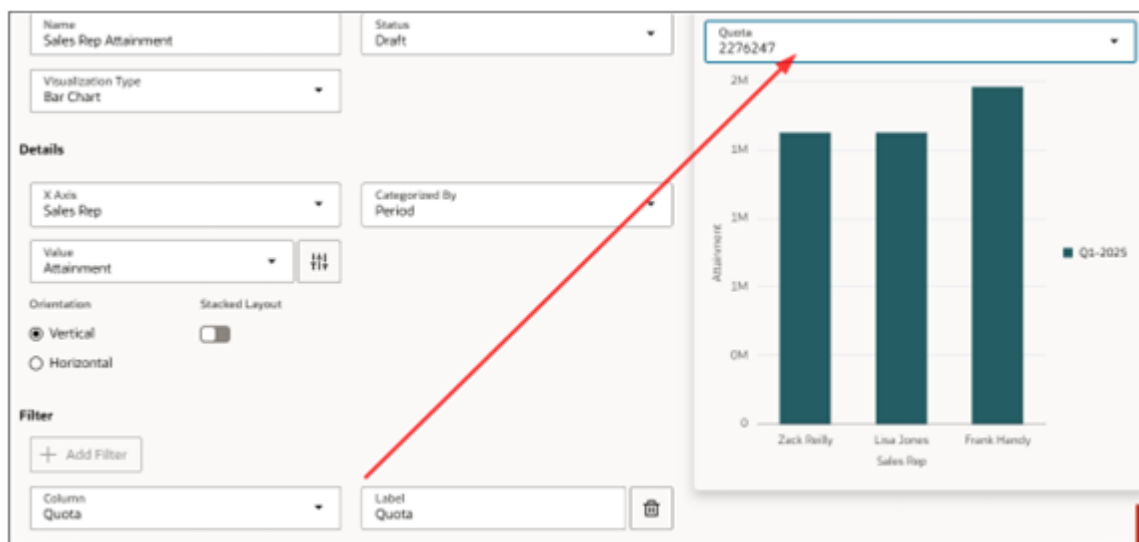
Yes, you can add multiple filters for a chart that you create using the Visualization Configuration tool in Application Composer.

- If you create the visualization from a specific saved search, then the visualization inherits the filters from the saved search.

- If you specify Default as the saved search, then you can update filters and add multiple filters during the configuration.



- If your source of data is an Oracle Transactional Business Intelligence (OTBI) analysis, then the filters come from that analysis. Optionally, you can add a filter to the visualization itself. Salespeople can select a filter value to narrow down the scope of the chart. The filter must be present in the analysis as an "as prompted" filter.



See the following topics in the How do I configure the Sales Dashboard in the Redwood User Experience? playbook:

- [Create Charts and Tables from Saved Searches](#)
- [Create Charts and Tables from OTBI Analyses](#)

## Why does global search return different results for users with the same query?

When using global search, the results can be different for different users using the same query. This can happen for many different reasons. For example, records that you can view are based on your position in the management chain and the security permissions assigned to you.

Here are some troubleshooting tips that you can use to identify why global search results might be different for different users who perform the same query.

- Check the assigned data security predicates for Parties and compare them with the Workspace-supported security data predicates. For example, the `Access the sales party for table HZ_PARTIES for all customers in the enterprise` data security policy must be present for the predefined Sales Representative role.
- From the **Tools > Scheduled Processes** page, search for and run the **Retrieve Latest LDAP Changes** and **Import User and Role Application Security Data Process** processes.
- You can also search for and run the **Search Index Optimization** and **Full Text Search Index Synchronization** processes from the **Tools > Scheduled Processes** page.

See the related topics for more information.

#### Related Topics

- [How do I hide a party usage in the global search results?](#)
- [Why didn't search using the Contains option in the legacy CRM Search return the expected search results?](#)
- [Can I disable Global Search for specific roles, such as partner roles?](#)
- [Why does my Workspace record query return fewer results than the record count in my reports?](#)
- [How can I verify what classic Oracle Sales pages apply for my global search configuration?](#)

## How do I increase the width of the address fields in Oracle Sales in the Redwood User Experience?

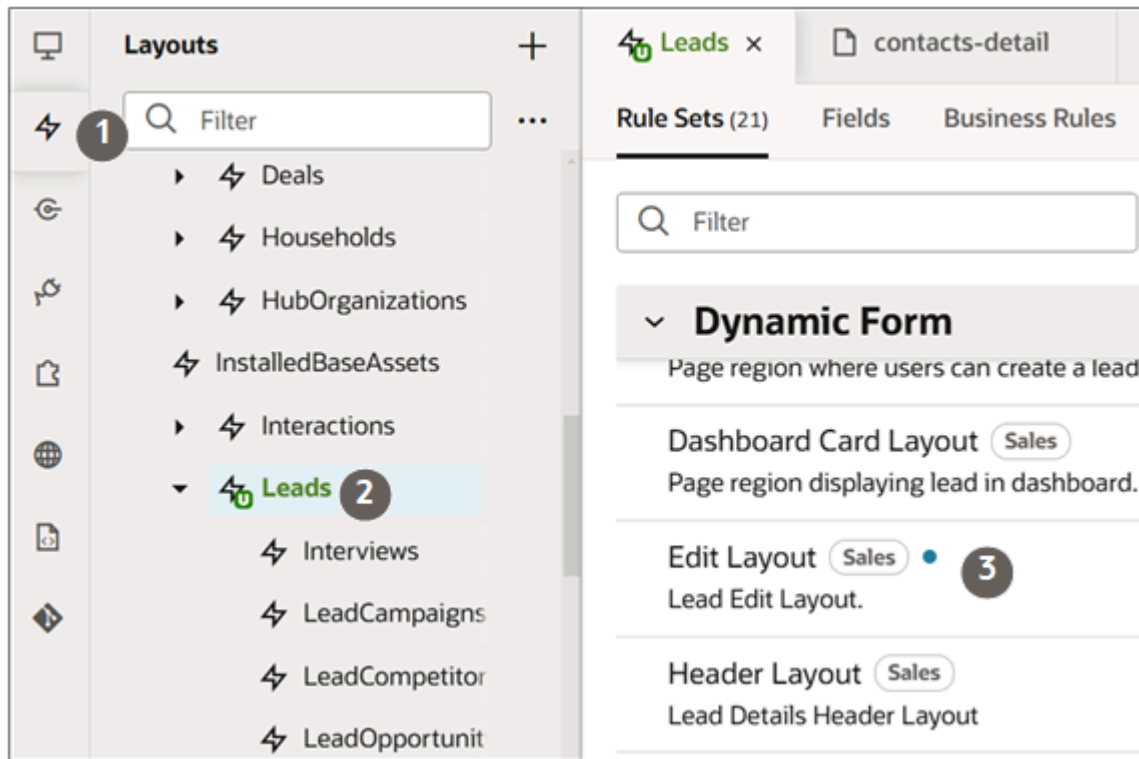
You can increase the width of address fields by having the address span over a greater number of columns on the page. To change the span of addresses and other fields, edit the JSON file display properties for the page layout and set the **colspan** property to the number of columns on the page: `{"<FieldName>": {"colspan":<x>}}` .. You must also make sure that the maximum columns on the page attribute matches ( `"maxColumns": <x>,`).

All address fields are part of the virtual field **FormattedAddress\_address**, so you can make the whole address wider by spanning this field over 4 columns instead of the default 2. You can't control the width of individual address elements, such as City, however. Which address fields appear in the address for each country and locale and in which order is specified in the setup task Manage Address Formats.

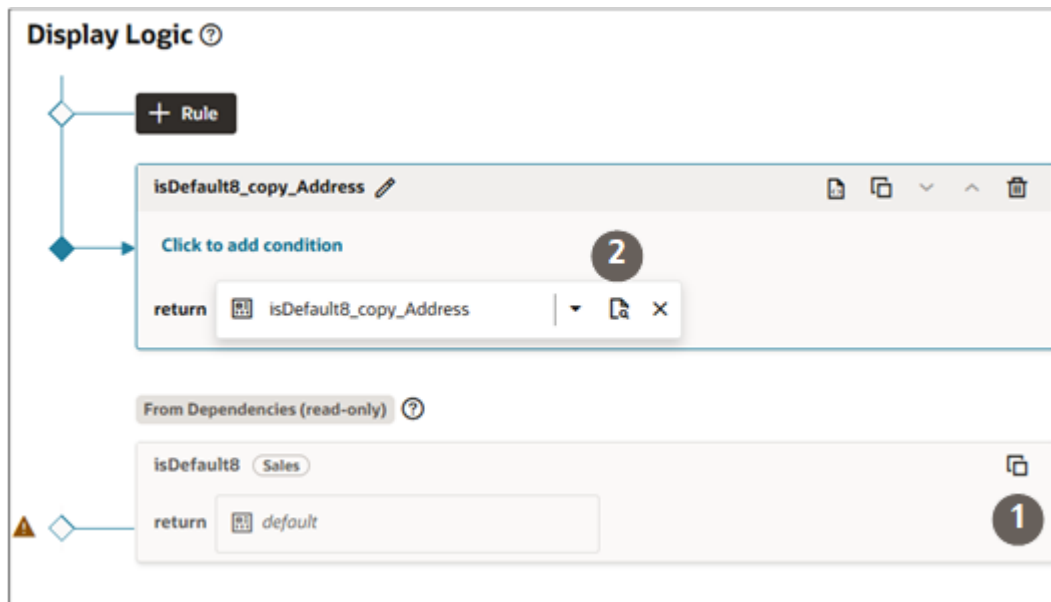
As an example, here's how to increase the width of the address fields in the Edit Leads page using Oracle Visual Builder Studio.

1. Open the Edit Leads page on a lead.
2. Open the page in VB Studio (**Settings and Actions > Edit Page in Visual Builder Studio**).
3. In VB Studio, click the **Layout** tab.
4. In the Layouts tab, expand the **Sales** node and click **Leads**.

5. Click **Edit Layout**.



6. Duplicate the default layout and edit it.



7. Click the **JSON** tab.

8. In the **DisplayProperties** update the **FormattedAddress\_address** entry to the following:

```
{
 "FormattedAddress_address": {
 "colspan": 4
 }
}
```

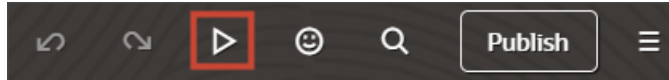
```
},
```

This expands the width of the address over 4 columns.

9. Update the maximum number of columns to 4:

```
"maxColumns": 4,
```

10. Click the **Preview** button to review the results.



## Why am I getting the error that no data is available when I create a visualization from an OTBI analysis for Oracle Sales in the Redwood User Experience?

If you're getting the error **Can't generate visualization. The criteria used for your visualization doesn't return any data**, then check if you can view the data in the analysis results. If you're getting this error along with a banner that tells you that your analysis: **"...has more columns than selected. Remove the unused columns from the analysis else visualization may not show correct data."**, then make sure the analysis and your visualization use the same columns.

The attributes that you use in your visualization must use all the columns in your Oracle Transactional Business Intelligence (OTBI) analysis. If you can't use all the columns in the visualization, go back to the analysis and remove the unused columns.

For example, a bar chart can support 2 dimensions, 1 metric, and you can have 1 filter attribute. If a report has more than 4 columns ( 3 dimensions and 1 fact), then you'll see this warning.

Visualizations can't show up correctly if the data in your analysis is aggregated or calculated with more columns than chart can support.

## How can I expand the width of the edit pages in Oracle Sales in the Redwood User Experience?

By default, the fields in edit pages span 2 columns. You can increase the width of the page by increasing the maximum number of columns to 3 or 4 using Oracle Visual Builder Studio.

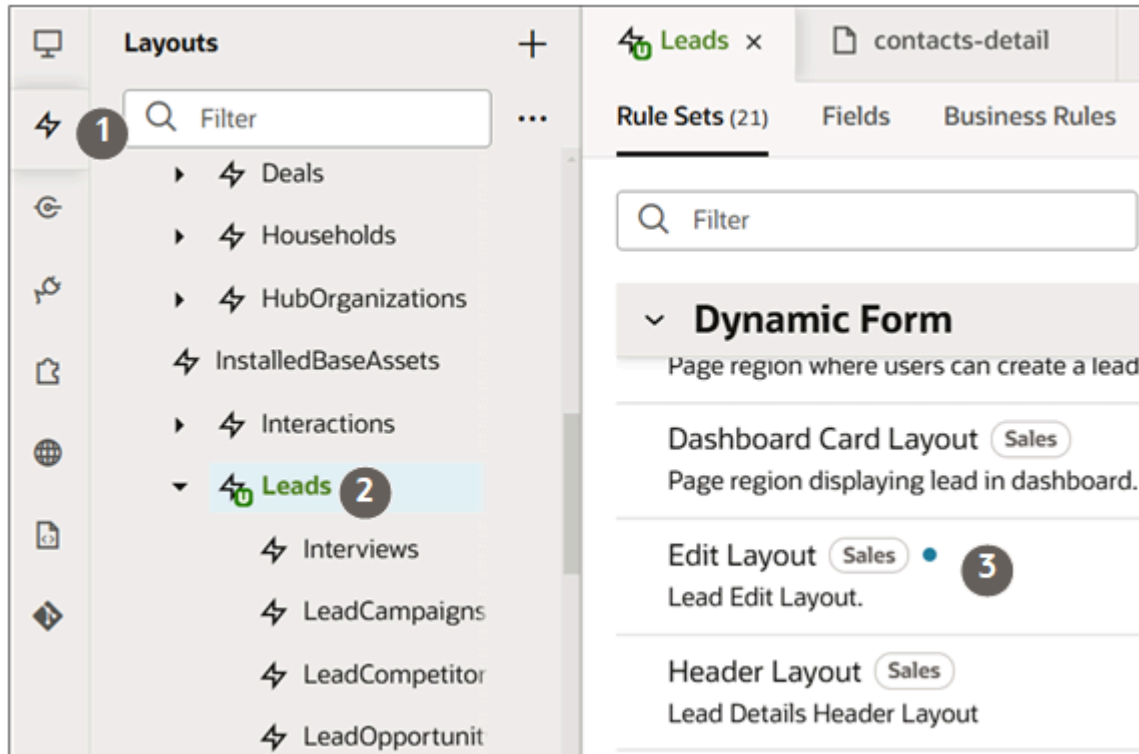
To make the change, edit the JSON file display properties for the edit page layout and set the **maxColumns** property to the new number.

Because address fields are set to a maximum span of 2 columns, you must also update the **colspan** property of the **FormattedAddress\_address** field: `{" FormattedAddress_address": {"colspan":<x>}} ,`

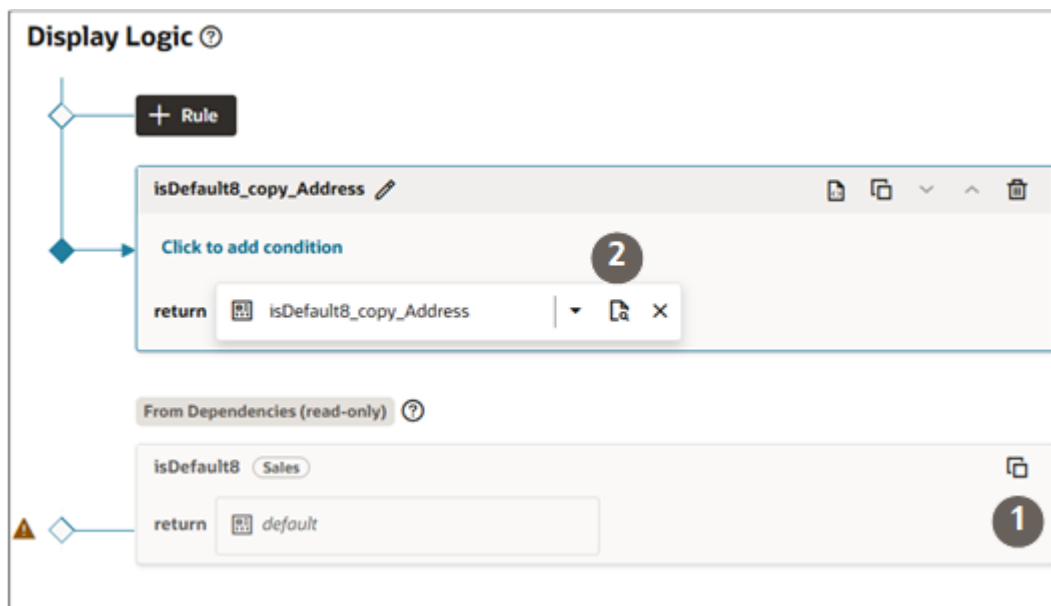
View the [video posted on Cloud Customer Connect](#) or follow these steps. The steps detail how to increase the width of the Edit Leads page.

1. Open the Edit Leads page on a lead.

2. Open the page in VB Studio (**Settings and Actions** > **Edit Page in Visual Builder Studio**).
3. In VB Studio, click the **Layout** tab.
4. In the Layouts tab, expand the **Sales** node and click **Leads**.
5. Click **Edit Layout**.



6. Duplicate the default layout and edit it.



7. Click the **JSON** tab.

8. In the **DisplayProperties** update the maximum number of columns to 4:

```
"maxColumns": 4,
```

This expands the width of the page to 4 columns.

9. To make the address fields span over 4 columns as well, update the **FormattedAddress\_address** entry to the following:

```
{
 "FormattedAddress_address": {
 "colspan": 4
 }
},
```

10. Click the **Preview** button to review the results.



## How do I configure workspace for Customer Data Management (CDM) entities like Organization, Person, and so on?

You can't configure workspace for Customer Data Management (CDM) entities.

For more information about the supported business objects, see [What are the Adaptive Search configuration supported business objects?](#)

## How do I disable the Snippet field for use as a search filter in the UI?

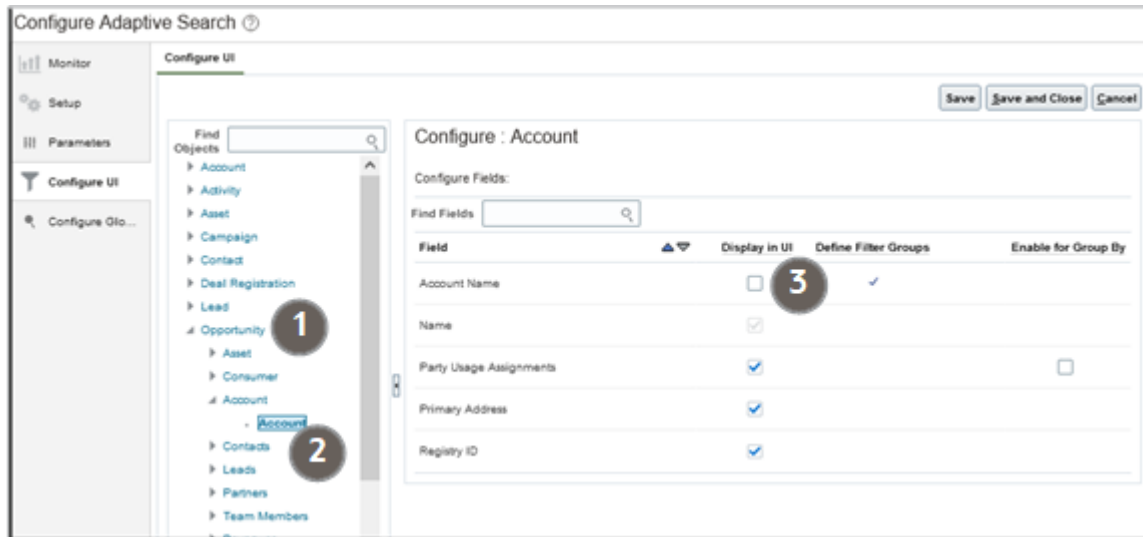
You can enable more fields for search, including custom ones. You can also remove existing fields from your Adaptive Search configuration. For example, the Snippet field is available for all objects in Adaptive Search and it shows the field or fields that matches a given keyword when a search is performed.

If you want the field to be displayed in the UI, either as a filter or as a column in search results, then you must enable it for display on the **Configure UI** tab of the **Configure Adaptive Search** page. See [How do I make a field searchable in the UI?](#) for more information.

If you don't want to avail of the Snippet field (or any other field), you can go to the specific object you want and deselect the **Display in UI** checkbox for the field. See this example.

1. In the Configure Adaptive Search page, click **Configure UI**.

2. To hide or disable a 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. Find and select the field's object in the object hierarchy. For example, select Account (callout 2).
  - c. Deselect **Display in UI** option for the field (callout 3).

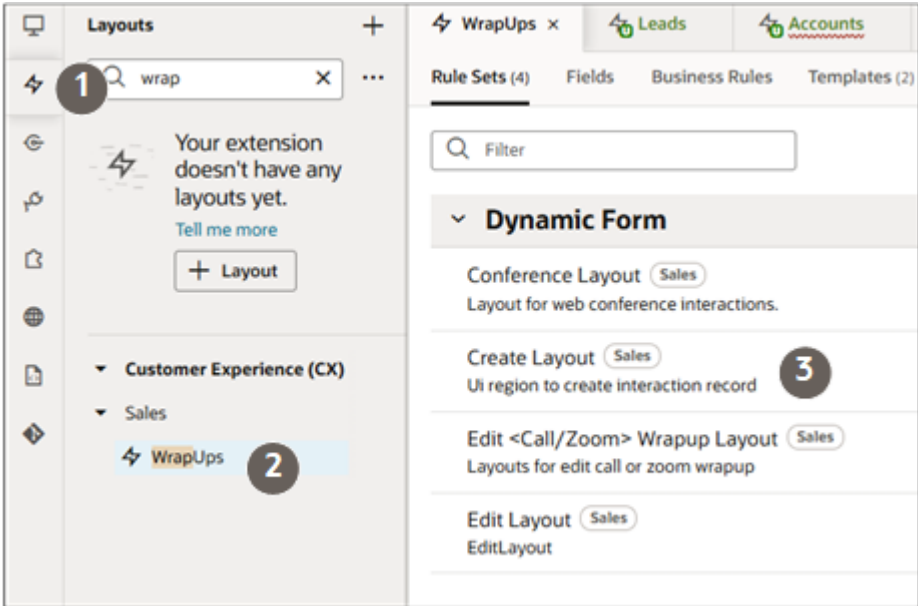


3. Click **Save and Close**.

## How can I configure the Log a Call page in Oracle Sales in the Redwood User Experience?

You can configure which fields appear in the Log a Call page by making and editing a copy of the WrapUps Create Layout in Oracle Visual Builder Studio. (**Layouts > WrapUps > Create Layout**)





# What are the Adaptive Search configuration supported business objects?

Oracle provides you with a default Adaptive Search configuration.

For each of the supported business objects, the table lists:

- The fields you can search using the Search box in all the UIs that use Adaptive Search
- The fields you can add as filters

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                           | Fields Enabled for the Search Box                                                                                                                                                                                                                                                                                                                                 |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account         | <ul style="list-style-type: none"><li>• Addresses</li><li>• Contacts<br/>(Name, Primary Address, Primary Email, Primary Phone)</li><li>• Created By</li><li>• Creation Date</li><li>• Emails</li><li>• Industries</li><li>• Instant Messages</li><li>• Last Updated By</li><li>• Last Updated Date</li><li>• Name</li></ul> | <ul style="list-style-type: none"><li>• Name</li><li>• Primary Address</li><li>• Primary Contact<br/>(Name, Primary Address, Primary Email, Primary Phone)</li><li>• Primary Email</li><li>• Primary Industry</li><li>• Primary Instant Message</li><li>• Primary Organization Type</li><li>• Primary Phone</li><li>• Primary URL</li><li>• Registry ID</li></ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Fields Enabled for the Search Box                                                                                                                                                                                                                                         |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>Organization Types</li> <li>Owner</li> <li>Phones</li> <li>Primary Address</li> <li>Primary Contact</li> <li>(Name, Primary Address, Primary Email, Primary Phone)</li> <li>Primary Email</li> <li>Primary Industry</li> <li>Primary Instant Message</li> <li>Primary Organization Type</li> <li>Primary Phone</li> <li>Primary URL</li> <li>Record Set</li> <li>Registry ID</li> <li>Team Members</li> <li>Type</li> <li>URLs</li> </ul>                                                                                           |                                                                                                                                                                                                                                                                           |
| Activity        | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Activity</li> <li>Asset (Asset Number, Serial Number)</li> <li>Call Report Count</li> <li>Consumer</li> <li>Contacts</li> <li>(Name, Primary Address, Primary Email, Primary Phone)</li> <li>Created By</li> <li>Creation Date</li> <li>Date</li> <li>Delegated By</li> <li>Description</li> <li>Dismiss</li> <li>Due Date</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Lead (Lead Name)</li> <li>Location</li> <li>Meeting Minutes</li> <li>Opportunity (Name)</li> </ul> | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Consumer</li> <li>Description</li> <li>Meeting Minutes</li> <li>Owner</li> <li>Primary Contact</li> <li>(Name, Primary Address, Primary Email, Primary Phone)</li> <li>Subject</li> </ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Fields Enabled for the Search Box                                                                                                                                                                                                                                      |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>Owner</li> <li>Primary Contact (Name)</li> <li>Priority</li> <li>Private</li> <li>Record Set</li> <li>Start Date</li> <li>Status</li> <li>Subject</li> <li>Team members</li> <li>Type</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                        |
| Asset           | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Asset Name</li> <li>Asset Number</li> <li>Competitor Asset</li> <li>Consumer</li> <li>Contacts</li> <li>(Name, Primary Address, Primary Email, Primary Phone)</li> <li>Created By</li> <li>Creation Date</li> <li>Description</li> <li>End Date</li> <li>Install Date</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Manufacturer</li> <li>Model</li> <li>Product</li> <li>Product Group</li> <li>Purchase Date</li> <li>Purchase Unit Price</li> <li>Quantity</li> <li>Record Set</li> <li>Serial Number</li> <li>Status</li> <li>Team Members</li> <li>Version</li> <li>Year</li> </ul> | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Asset Name</li> <li>Asset Number</li> <li>Consumer</li> <li>Description</li> <li>Manufacturer</li> <li>Model</li> <li>Product</li> <li>Product Group</li> <li>Serial Number</li> </ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Fields Enabled for the Search Box                                                                                                                                                                              |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Campaign        | <ul style="list-style-type: none"> <li>Actual Cost</li> <li>Budgeted Cost</li> <li>Campaign Created By</li> <li>Campaign Creation Date</li> <li>Campaign Last Update Date</li> <li>Campaign Last Updated By</li> <li>Campaign Number</li> <li>Created By</li> <li>Created by Module</li> <li>Creation Date</li> <li>Description</li> <li>End Date</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Name</li> <li>Owner</li> <li>Parent Campaign</li> <li>Product Description</li> <li>Region Code</li> <li>Source System Campaign ID</li> <li>Start Date</li> <li>Status</li> <li>Total Leads</li> <li>Total Opportunities</li> <li>Total Opportunities Revenue</li> <li>Type (Campaign Number, Name, and Status)</li> </ul> | <ul style="list-style-type: none"> <li>Campaign Number</li> <li>Description</li> <li>Name</li> <li>Origin</li> <li>Parent Campaign</li> <li>Source System Campaign ID</li> <li>Status</li> <li>Type</li> </ul> |
| Case            | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Activity ID</li> <li>Actual Start Date</li> <li>Address Line 1</li> <li>Assigned To (Name, Primary Email, Primary Phone)</li> <li>City</li> <li>Contact (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Contact Name</li> <li>Country</li> <li>Created By</li> </ul>                                                                                                                                                                                                                                                                                                                                                                      | <ul style="list-style-type: none"> <li>Reference Number</li> </ul>                                                                                                                                             |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Fields Enabled for the Search Box                        |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>• Creation Date</li> <li>• Email</li> <li>• Estimated Start Date</li> <li>• Favorite</li> <li>• Field Service Resource (Name, Primary Email, Primary Phone)</li> <li>• Integration</li> <li>• Last Updated By</li> <li>• Last Updated Date</li> <li>• Partner Account (Name, Primary Address)</li> <li>• Phone</li> <li>• Postal Code</li> <li>• Primary Asset (Asset Number, Serial Number)</li> <li>• Product (Name)</li> <li>• Product Group (Name)</li> <li>• Record Set</li> <li>• Reference Number</li> <li>• Requested Date</li> <li>• Requested Date and Start Time</li> <li>• Requested Time Slot</li> <li>• Resolution Due</li> <li>• Scheduled Date</li> <li>• Scheduled Date and Start Time</li> <li>• Scheduled Time Slot</li> <li>• Service Request (Channel Type, Owner Type, Reference Number, Stripe Code, Title)</li> <li>• State</li> <li>• Status</li> <li>• Time Zone</li> <li>• Title</li> <li>• Work Order Area</li> <li>• Work Order Integration Status Code</li> <li>• Work Order Status (Status, Status Category)</li> <li>• Work Order Type (Work Order Type Code)</li> </ul> |                                                          |
| Competitor      | <ul style="list-style-type: none"> <li>• Country Name</li> <li>• Created By</li> <li>• Creation Date</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <ul style="list-style-type: none"> <li>• Name</li> </ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Fields Enabled for the Search Box                                                                                                                                                                                                                                                       |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Name</li> <li>Registry ID</li> <li>SIC Code</li> <li>Status</li> <li>Threat Level</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                                                                                                                                                                                                                                                         |
| Contact         | <ul style="list-style-type: none"> <li>Affinity</li> <li>Annual Income</li> <li>Buying Role</li> <li>Contact Role</li> <li>Created By</li> <li>Creation Date</li> <li>First Name</li> <li>Job Title</li> <li>Last Contact Date</li> <li>Last Name</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Middle Name</li> <li>Name</li> <li>Owner</li> <li>Preferred Contact Method</li> <li>Primary Account (Name, Primary Address)</li> <li>Registry ID</li> <li>Registration Status</li> <li>Sales Profile Status</li> <li>Type</li> <li>Accounts (Name, Primary Address)</li> <li>Addresses</li> <li>Emails</li> <li>Instant Messages</li> <li>Phones</li> <li>Primary Address</li> <li>Primary Email</li> <li>Primary Instant Message</li> <li>Primary Phone</li> <li>Primary URL</li> </ul> | <ul style="list-style-type: none"> <li>First Name</li> <li>Job Title</li> <li>Last Name</li> <li>Middle Name</li> <li>Name</li> <li>Primary Address</li> <li>Primary Email</li> <li>Primary Instant Message</li> <li>Primary Phone</li> <li>Primary URL</li> <li>Registry ID</li> </ul> |

| Business Object   | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Fields Enabled for the Search Box                                                                                                                                                                                                              |
|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | <ul style="list-style-type: none"> <li>Record Set</li> <li>Team Members</li> <li>URLs</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                                |
| Deal Registration | <ul style="list-style-type: none"> <li>Approval Decision By (Name, Primary Email, Primary Phone)</li> <li>Approval Decision Date</li> <li>Close Date</li> <li>Contact Email</li> <li>Contact First Name</li> <li>Contact Last Name</li> <li>Created By</li> <li>Creation Date</li> <li>Deal Products (Name)</li> <li>Deal Size</li> <li>Deal Type</li> <li>Existing Account (Name, Primary Address, Registry ID)</li> <li>Existing Contact (Do not call, Do not contact, Do not email, Do not mail, Name, Primary Address, Primary Email, Primary Phone)</li> <li>Expiration Date</li> <li>Job Title</li> <li>Last Completed Activity</li> <li>Last Completed Call Activity</li> <li>Last Completed Email Activity</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Lead (Lead Name)</li> <li>Name</li> <li>New Account</li> <li>New Contact</li> <li>Next Task Due</li> <li>Number of Completed Activities</li> <li>Number of Completed Call Activities</li> <li>Number of Completed Email Activities</li> <li>Number of Products</li> <li>Number of Team Members</li> <li>Opportunity (Name)</li> <li>Opportunity Account (Account Name, Name, Primary Address)</li> </ul> | <ul style="list-style-type: none"> <li>Registration Number</li> <li>Existing Contact (Name)</li> <li>Existing Account (Name, Primary Address, Registry ID)</li> <li>Partner (Name, Partner Number, Primary Address)</li> <li>Status</li> </ul> |

| Business Object      | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Fields Enabled for the Search Box                                                              |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
|                      | <ul style="list-style-type: none"> <li>• Opportunity Contact (Do not call, Do not contact, Do not email, Do not mail, Name, Primary Address, Primary Email, Primary Phone)</li> <li>• Owner (Name, Primary Email, Primary Phone)</li> <li>• Partner (Name, Partner Number, Primary Address, Public Address ID, Public Email ID, Public Fax ID, Public Phone ID)</li> <li>• Partner Type</li> <li>• Record Set</li> <li>• Registration Number</li> <li>• Rejected Comments</li> <li>• Rejected Reason</li> <li>• Returned Comments</li> <li>• Returned Reason</li> <li>• Status</li> <li>• Submitted By (Name, Primary Email, Primary Phone)</li> <li>• Submitted Date</li> <li>• Team Members (Name, Primary Email, Primary Phone)</li> </ul> |                                                                                                |
| HR Help Desk Request | <ul style="list-style-type: none"> <li>• Assigned To (Name, Primary Email, Primary Phone)</li> <li>• Category Name</li> <li>• Channel Type</li> <li>• Contact (Do not call, Do not contact, Do not email, Do not mail, Name, Primary Address, Primary Email, Primary Phone)</li> <li>• Created By</li> <li>• Creation Date</li> <li>• Critical</li> <li>• Date Closed</li> <li>• Date Reported</li> <li>• Language Code</li> <li>• Last Updated By</li> <li>• Last Updated Date</li> <li>• Messages (Channel Type, Message Content, Posted By)</li> <li>• Outcome Problem</li> <li>• Owner Type</li> <li>• Problem Description</li> <li>• Product (Name)</li> </ul>                                                                           | <ul style="list-style-type: none"> <li>• Contact (Name)</li> <li>• Reference Number</li> </ul> |



| Business Object          | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Fields Enabled for the Search Box                                                          |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
|                          | <ul style="list-style-type: none"> <li>Product Group (Name)</li> <li>Queue (Queue Name)</li> <li>Record Set</li> <li>Reference Number</li> <li>Reported By (Name, Primary Email, Primary Phone)</li> <li>Resolution Code</li> <li>Resolution Date</li> <li>Resolved By</li> <li>Severity</li> <li>Solution Description</li> <li>Status Team Members (Name, Primary Email, Primary Phone) Title</li> <li>Status Type</li> <li>Stripe Code</li> <li>Team Members (Name, Primary Email, Primary Phone)</li> <li>Title</li> </ul>                                                                                                                                                               |                                                                                            |
| Internal Service Request | <ul style="list-style-type: none"> <li>Assigned To (Name, Primary Email, Primary Phone)</li> <li>Category Name</li> <li>Channel Type</li> <li>Contact (Do not call, Do not contact, Do not email, Do not mail, Name, Primary Address, Primary Email, Primary Phone)</li> <li>Created By</li> <li>Creation Date</li> <li>Critical</li> <li>Date Closed</li> <li>Date Reported</li> <li>Language Code</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Messages (Channel Type, Message Content, Posted By)</li> <li>Outcome Problem</li> <li>Owner Type</li> <li>Problem Description</li> <li>Product (Name)</li> <li>Product Group (Name)</li> <li>Queue (Queue Name)</li> </ul> | <ul style="list-style-type: none"> <li>Contact (Name)</li> <li>Reference Number</li> </ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Fields Enabled for the Search Box                                                                                                                                                                                    |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>Record Set</li> <li>Reference Number</li> <li>Reported By (Name, Primary Email, Primary Phone)</li> <li>Resolution Code</li> <li>Resolution Date</li> <li>Resolved By</li> <li>Severity</li> <li>Solution Description</li> <li>Status Team Members (Name, Primary Email, Primary Phone) Title</li> <li>Status Type</li> <li>Stripe Code</li> <li>Team Members (Name, Primary Email, Primary Phone)</li> <li>Title</li> </ul>                                                                                                                                                                                                                   |                                                                                                                                                                                                                      |
| Lead            | <ul style="list-style-type: none"> <li>Accepted Date</li> <li>Account (Name, Primary Address)</li> <li>Consumer</li> <li>Contacts (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Conversion Reason</li> <li>Created By</li> <li>Creation Date</li> <li>Deal Size</li> <li>Estimated Close Date</li> <li>Existing Contact (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Lead Name</li> <li>Lead Number</li> <li>Owner</li> <li>Primary Product</li> <li>Primary Product Group</li> <li>Products</li> <li>Qualification Date</li> <li>Rank</li> <li>Reassign Reason</li> <li>Record Set</li> </ul> | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Consumer</li> <li>Existing Contact (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Lead Name</li> <li>Rank</li> </ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Fields Enabled for the Search Box                                                                                                                                                                                                                                                                            |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>Score</li> <li>Source</li> <li>Status</li> <li>Team Members</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                              |
| Opportunity     | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Asset (Asset Number, Serial Number)</li> <li>Close Date</li> <li>Consumer</li> <li>Contacts (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Created By</li> <li>Creation Date</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Leads (Lead Name)</li> <li>Line of Business</li> <li>Name</li> <li>Owner</li> <li>Primary Contact (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Primary Revenue</li> <li>Record Set</li> <li>Revenues</li> <li>Sales Stage</li> <li>Status Category</li> <li>Team Members</li> </ul> | <ul style="list-style-type: none"> <li>Line of Business</li> <li>Name</li> <li>Primary Revenue</li> </ul>                                                                                                                                                                                                    |
| Partner         | <ul style="list-style-type: none"> <li>Addresses</li> <li>Created By</li> <li>Creation Date</li> <li>Emails</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Level</li> <li>Name</li> <li>Owner (Name, Primary E-Mail, Primary Phone)</li> <li>Parent Partner (Name, Owner, Partner Number, Primary Address)</li> <li>Partner Contacts</li> </ul>                                                                                                                                                                                                                                                                                   | <ul style="list-style-type: none"> <li>Name</li> <li>Partner Number</li> <li>Primary Address</li> <li>Primary Contact (First Name, Last Name, Middle Name, Name, Primary Address, Primary E-Mail, Primary Phone, Primary URL)</li> <li>Primary E-Mail</li> <li>Primary Phone</li> <li>Primary URL</li> </ul> |

| Business Object  | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Fields Enabled for the Search Box                                                                                                                                                                                               |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                  | <ul style="list-style-type: none"> <li>• Partner Number</li> <li>• Partner Types</li> <li>• Phones</li> <li>• Primary Address (Address, City, Country, State)</li> <li>• Primary Contact (Name, Primary Address, Primary E-Mail, Primary Phone)</li> <li>• Primary E-Mail</li> <li>• Primary Phone</li> <li>• Primary URL</li> <li>• Record Set</li> <li>• Registry ID</li> <li>• Status</li> <li>• Team Members</li> <li>• URLs</li> </ul>                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                 |
| Partner Contacts | <ul style="list-style-type: none"> <li>• Addresses</li> <li>• Certification Level</li> <li>• Certification Reason</li> <li>• Comments</li> <li>• Created By</li> <li>• Creation Date</li> <li>• Department</li> <li>• Department Code</li> <li>• Duplicate Type</li> <li>• Emails</li> <li>• Enrichment Status</li> <li>• First Name</li> <li>• Internal Job</li> <li>• Title</li> <li>• Last Assigned Date</li> <li>• Last Contact Date</li> <li>• Last Known Location</li> <li>• Last Name</li> <li>• Last Updated By</li> <li>• Last Updated Date</li> <li>• Middle Name</li> <li>• Name Partner (Name, Owner, Partner Number, Primary Address)</li> <li>• Phones</li> </ul> | <ul style="list-style-type: none"> <li>• First Name</li> <li>• Last Name</li> <li>• Middle Name</li> <li>• Name</li> <li>• Primary Address</li> <li>• Primary E-Mail</li> <li>• Primary Phone</li> <li>• Primary URL</li> </ul> |

| Business Object      | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Fields Enabled for the Search Box                                                                                                                                  |
|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                      | <ul style="list-style-type: none"> <li>Primary Address (Address, City, Country, State)</li> <li>Primary E-Mail</li> <li>Primary Phone</li> <li>Primary URL</li> <li>Record Set</li> <li>Registration Status</li> <li>Title</li> <li>URLs</li> </ul>                                                                                                                                                                                                                                                                                                                                                                    |                                                                                                                                                                    |
| Quotes and Orders    | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Active</li> <li>Amount</li> <li>Contact (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Created By</li> <li>Creation Date</li> <li>Description</li> <li>Last Synchronized</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Name</li> <li>Opportunity (Name)</li> <li>Owner</li> <li>Placed On</li> <li>Quote ID</li> <li>Quote or Order Number</li> <li>Record Set</li> <li>Reference Code</li> <li>Reference Number</li> <li>Status</li> <li>Valid To Date</li> <li>Version</li> <li>Win Status</li> </ul> | <ul style="list-style-type: none"> <li>Name</li> <li>Quote or Order Number</li> </ul>                                                                              |
| Quote and Order Line | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Contact (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Created By</li> <li>Creation Date</li> <li>Last Updated By</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                           | <ul style="list-style-type: none"> <li>Account</li> <li>Contact</li> <li>Opportunity</li> <li>Order Line Item</li> <li>Product Name</li> <li>Record Set</li> </ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Fields Enabled for the Search Box                                                                                                                                                                                                                                                                                                                                                                                                        |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>Last Updated Date</li> <li>Line Amount</li> <li>Line Contract End Date</li> <li>Line Contract Value</li> <li>Line Discount</li> <li>Line Price Period</li> <li>Line Price Type</li> <li>Line Request Date</li> <li>Line Status</li> <li>Opportunity (Name, Opportunity Number, Status)</li> <li>Order Line Item</li> <li>Product Name</li> <li>Record Set</li> <li>Sales Orders (Active, Creation Date, Valid To Date, Name, Quote or Order Number, Amount, Status, Win Status)</li> </ul> | <ul style="list-style-type: none"> <li>Sales Orders</li> </ul>                                                                                                                                                                                                                                                                                                                                                                           |
| Revenue Lines   | <ul style="list-style-type: none"> <li>Account</li> <li>Amount</li> <li>Best Case</li> <li>Close Date</li> <li>Competitor</li> <li>Conversation Rate</li> <li>Cost</li> <li>Created By</li> <li>Creation Date</li> <li>Discount</li> <li>Estimated Price</li> <li>Expected Delivery Date</li> <li>Expected Revenue</li> <li>Favorite</li> <li>Forecast Territory</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Margin</li> <li>Opportunity</li> <li>Owner</li> <li>Primary Partner</li> <li>Product</li> </ul>     | <ul style="list-style-type: none"> <li>Account</li> <li>Competitor</li> <li>Created By</li> <li>Forecast Territory</li> <li>Last Updated Date</li> <li>Opportunity</li> <li>Owner</li> <li>Primary Partner</li> <li>Product</li> <li>Product Group</li> <li>Recurrence Type Code</li> <li>Sales Credit Allocation</li> <li>Sales Credit Type</li> <li>Split Type Code</li> <li>Status</li> <li>UOM</li> <li>Win / Loss Reason</li> </ul> |

| Business Object  | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Fields Enabled for the Search Box                                                                                                                                                                                                                                          |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                  | <ul style="list-style-type: none"> <li>• Product Group</li> <li>• Quantity</li> <li>• Record Set</li> <li>• Recurrence Type Code</li> <li>• Sales Credit</li> <li>• Sales Credit Allocation</li> <li>• Sales Credit Type</li> <li>• Split Type Code</li> <li>• Status</li> <li>• UOM</li> <li>• Win Probability</li> <li>• Win / Loss Reason</li> <li>• Worse Case</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                            |
| Service Requests | <ul style="list-style-type: none"> <li>• Account (Name, Primary Address)</li> <li>• Asset (Asset Number, Serial Number)</li> <li>• Assigned To (Name, Primary Email, Primary Phone)</li> <li>• Category Name</li> <li>• Channel Type</li> <li>• Contacts (Name, Primary Address, Primary Email, Primary Phone, Registry ID)</li> <li>• Created By</li> <li>• Creation Date</li> <li>• Critical</li> <li>• Date Closed</li> <li>• Date Reported</li> <li>• Language Code</li> <li>• Last Updated By</li> <li>• Last Updated Date</li> <li>• Messages (Channel Type, Message Content)</li> <li>• Outcome</li> <li>• Owner Type</li> <li>• Primary Contact (Name, Primary Address, Primary Email, Primary Phone, Registry ID)</li> <li>• Problem Description</li> <li>• Product (Name)</li> <li>• Product Group (Name)</li> <li>• Queue (Queue Name)</li> <li>• Record Set</li> </ul> | <ul style="list-style-type: none"> <li>• Account (Name, Primary Address)</li> <li>• Consumer (Name, Primary Address, Primary Email, Primary Phone)</li> <li>• Primary Contact (Name, Primary Address, Primary Email, Primary Phone)</li> <li>• Reference Number</li> </ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                            | Fields Enabled for the Search Box |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|
|                 | <ul style="list-style-type: none"><li>• Reference Number</li><li>• Reported By (Name, Primary Email, Primary Phone)</li><li>• Resolution Code</li><li>• Resolution Date</li><li>• Resolved By</li><li>• Severity</li><li>• Solution Description</li><li>• Status</li><li>• Stripe Code</li><li>• Team Members (Name, Primary Email, Primary Phone)</li><li>• Title</li></ul> |                                   |



| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Fields Enabled for the Search Box                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Territory       | <ul style="list-style-type: none"> <li>Coverage <ul style="list-style-type: none"> <li>Account Name</li> <li>Account Type</li> <li>Additional Attribute 1</li> <li>Additional Attribute 2</li> <li>Additional Attribute 3</li> <li>Additional Attribute 4</li> <li>Additional Attribute 5</li> <li>Aux1</li> <li>Aux2</li> <li>Aux3</li> <li>Business Unit</li> <li>Coverage Type</li> <li>Coverage Model</li> <li>Customer Size</li> <li>City</li> <li>County</li> <li>Country</li> <li>Geography</li> <li>Geography High ID</li> <li>Include Hierarchy</li> <li>Item</li> <li>Inventory Organization</li> <li>Industry</li> <li>Partner</li> <li>Province</li> <li>Postal Code</li> <li>Product Group</li> <li>Sales Channel</li> <li>Sales Subchannel</li> <li>State</li> </ul> </li> <li>Coverage Model</li> <li>Created By</li> <li>Creation Date</li> <li>Description</li> <li>Eligible for Quota</li> </ul> | <ul style="list-style-type: none"> <li>Coverage <ul style="list-style-type: none"> <li>Account Name</li> <li>Account Type</li> <li>Additional Attribute 1</li> <li>Additional Attribute 2</li> <li>Additional Attribute 3</li> <li>Additional Attribute 4</li> <li>Additional Attribute 5</li> <li>Aux1</li> <li>Aux2</li> <li>Aux3</li> <li>Business Unit</li> <li>Coverage Type</li> <li>Coverage Model</li> <li>Customer Size</li> <li>City</li> <li>County</li> <li>Country</li> <li>Geography</li> <li>Geography High ID</li> <li>Include Hierarchy</li> <li>Item</li> <li>Inventory Organization</li> <li>Industry</li> <li>Partner</li> <li>Province</li> <li>Postal Code</li> <li>Product Group</li> <li>Sales Channel</li> <li>Sales Subchannel</li> <li>State</li> </ul> </li> <li>Description</li> <li>Function</li> <li>Name</li> <li>Owner</li> <li>Parent Territory</li> </ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Fields Enabled for the Search Box                                                                                                                                                                                                                                                                                               |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>• Forecast Participation Code</li> <li>• Function</li> <li>• Last Updated By</li> <li>• Last Updated Date</li> <li>• Leaf Territory</li> <li>• Line of Business</li> <li>• Name</li> <li>• Owner</li> <li>• Parent Territory</li> <li>• Parent Territory Number</li> <li>• Parent Territory Unique Number</li> <li>• Partner (Name, Partner Number, Primary Address, Public Address ID, Public Email ID, Public Fax ID, Public Phone ID)</li> <li>• Partner ID</li> <li>• Resource</li> <li>○ Forecasting Delegate</li> <li>○ Team Member Function</li> <li>• Source Territory</li> <li>• Team Members (Name, Primary Email, Primary Phone)</li> <li>• Territory ID</li> <li>• Territory Number</li> <li>• Type</li> <li>• Unique Territory Number</li> </ul> | <ul style="list-style-type: none"> <li>• Parent Territory Number</li> <li>• Parent Territory Unique Number</li> <li>• Partner ID</li> <li>• Resource</li> <li>○ Forecasting Delegate</li> <li>○ Team Member Function</li> <li>• Source Territory</li> <li>• Territory ID</li> <li>• Territory Number</li> <li>• Type</li> </ul> |
| Work Order      | <ul style="list-style-type: none"> <li>• Assignee Party Name (Name, Primary Email, Primary Phone)</li> <li>• Case Category ID</li> <li>• Case Message</li> <li>• Case Number</li> <li>• Case Opportunity (Name)</li> <li>• Case Resource (Name, Primary Email, Primary Phone)</li> <li>• Closed Date</li> <li>• Contacts (Name, Primary Address, Primary Email, Primary Phone)</li> <li>• Created By</li> <li>• Creation Date</li> <li>• Description</li> <li>• Favorite</li> </ul>                                                                                                                                                                                                                                                                                                                  | <ul style="list-style-type: none"> <li>• Case Number</li> </ul>                                                                                                                                                                                                                                                                 |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                             | Fields Enabled for the Search Box |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|
|                 | <ul style="list-style-type: none"><li>• Last Updated By</li><li>• Last Updated Date</li><li>• Open Date</li><li>• Primary Contact Party ID</li><li>• Queue ID</li><li>• Reported by Party Name (Name, Primary Email, Primary Phone)</li><li>• Title</li></ul> |                                   |

# How can I edit the primary product details for my leads in Oracle Sales?

Here's how to edit the primary product or primary product group to a lead for Sales in the Redwood UX.

You can browse the product catalog and search for your product by entering **browse** in the Action Bar and then selecting **Browse Catalog**. Or, if you know the exact name of the product you want to edit, then you can quickly add the product from the **Add Products** panel.

**Note:** When adding a product using either the **Add Products** panel or the **Browse Catalog**, the first product or product group you add becomes the default primary product or primary product group.

1. Open the lead that you want to update.

For example, lets say you want to change the primary product for an existing lead from **Education** to **Desktops**.

My Open Leads

Clarke James 1/29/25 7:45 PM

Unqualified

Primary Contact Clarke James

Account ABC Networks (Standing Rock Indian Res, US)

Try Send Email

Activities

Recent

Sales Lead Updated  
By Matt Hooper  
3/10/25 7:23 PM

Sales Lead Created  
By Matt Hooper  
1/29/25 7:45 PM

Contacts

J

Clarke James

Primary

Products

Education Products  
\$ 11

DCS\_Product\_Group\_Search\_1  
\$ 44

DCS\_Product\_Group\_With\_No\_  
\$ 99

Education  
\$ 176

Team

MH

Matt Hooper  
sendmail-test-discar...

2. Click **Details**.

ORACLE

928

3. In the **Product Group- Filter by Territory** field, search for and select the product or product group that you want and click **Save**.

Clarke James 1/29/25 7:45 PM

Primary Contact - Related Contacts  
Clarke James

Lead Name  
Clarke James 1/29/25 7:45 PM

Job Title

Account Name  
ABC Networks (Standing Rock Indian Res, U

Product Type  
Group

Product Group - Filter by Territory  
Desk

Display

Desktops

1 Contact Phone

Contact Preference  
☒ None ☐ Do Not Call ☐ OK to Call

Description

Owner  
Matt Hooper

Currency  
USD

Deal Size  
\$ 330

Score

Rank

Address Details

Once you've changed the primary product / product group to **Desktops**, you won't have the option to change or select a different primary product or primary product group from the **Products** view. The **Product Type** and **Product Group- Filter by Territory** fields aren't displayed on the **Edit Sales Lead Product** panel. You must open the lead for which you want to change the primary product or product group and click **Details** as outlined at the start of this procedure.

4. You can change a non primary or non primary product group by clicking **Actions** (the three horizontal dots icon ) and selecting **Edit** as shown.

The screenshot shows the 'My Open Leads' section for 'Clarke James' on 1/29/25 at 7:45 PM. The lead is 'Unqualified' and the primary contact is 'Clarke James'. The account is 'ABC Networks (Standing Rock Indian Res, US)'. A 'Try Browse Catalog' button is visible. Below this is a table of product groups. The 'Product Type' column has a dropdown menu set to 'Group'. The 'Item Description' column has a dropdown menu set to 'Desktops'. The 'Quantity' column has a dropdown menu set to '1'. The 'Amount' column has a dropdown menu set to '\$ 11'. A red box highlights the 'Desktops' item description, and a red arrow points from it to the 'Product Type' dropdown menu in the 'Edit Sales Lead Product' dialog.

| Product Type | Item Description                   | Quantity |
|--------------|------------------------------------|----------|
| Group        | Desktops                           |          |
| Group        | Education Products                 | 1        |
| Group        | DCS_Product_Group_Search_1         | 2        |
| Group        | DCS_Product_Group_With_No_Articles | 3        |
| Group        | Education                          | 4        |

5. When you're done adding and editing your lead product details, click **Save**.

#### Related Topics

- [How do I add products to an opportunity in Sales in the Redwood User Experience?](#)
- [Why don't I see any products and product groups when I try to add them to leads and opportunities?](#)
- [How can I get a list of all products and product groups?](#)

## Can I create a contact for my lead without converting to an opportunity?

Yes. Lead Management supports both net new leads, where salespeople manually enter the contact and account names, and repeat business leads, where salespeople search for and select existing accounts and contacts to assign to leads.

By default, the leads pages display only names of accounts and contacts that already exist in the application. To create leads for new accounts or add new contacts, you must create the appropriate account and contact records before creating the lead.

If your business uses net new leads where contact and account values are entered manually using free form text fields, then you can make the New Account and New Contact fields available on the Leads UI through Application Composer. These fields are hidden by default so to use them for your new leads, you must manually unhide these fields.

**Note:**

If the new lead that you enter gets converted to an opportunity, the details become available as existing account or contact information.

## How can I edit assignment rules to randomly assign resources to Opportunities?

Assignment rules are created using rule sets, rules, conditions, and actions. The assignment process uses your rules to evaluate and recommend candidate assignments for specified work objects. This includes randomly assigning salespeople to work on opportunities.

A rule category is predefined for each type of rule-based assignment processing supported by each sales application object. For example, the rule category **Sales Team Member Recommendation Default Rule Category** is predefined for resource rule-based assignment of Opportunities. When the filter is set to **Random**, a random selection of matching candidates is assigned to the work object.

Here's how to access the category to change assignment rules to randomly assign resources.

1. In the **Setup and Maintenance** work area, go to:
  - o Offering: Sales
  - o Functional Area: Opportunities
  - o Task: Manage Sales Assignment Manager Rules
2. In the Manage Sales Assignment Manager Rules page, select the category where your existing rules were created, in this case **Sales Team Member Recommendation Default Rule Category**.

**Note:** Random is selected as the filter type.

3. In the **Conditions** section of the existing rule, update the details for your object to suit your requirements.
4. Click **Save and Publish** to publish the assignment details.

### *Related Topics*

- [How can I define the automatic assignment of Lead team resources?](#)
- [Can I change how opportunity territory-based assignment automatically assigns by opportunity owner?](#)
- [What types of assignment rules can I create?](#)

## Can I mass transfer Contacts?

We can't mass transfer Accounts and Contacts.

You can mass transfer Leads, Opportunities, Deal Registrations, and all custom objects excluding the vertical custom object that belong to a user. However, you can export the contacts of the current owner and import them with a new owner.

## How do I update a party?

Run the Synchronize Person Records scheduled process to update a party.

While running the Synchronize Person Records scheduled process, ensure that you specify the start dates of the persons in the date range of the scheduled process.

## Why am I seeing the You Cannot Lock this record because it has already been deleted message?

This message appears when you access any deleted or inactive record.

As a Data Steward, you can look for inactive records and when you access these records you get this message.

## Why is the account owner field blank after I disabled and enabled it back?

Run the Reporting Hierarchy Generation and the Update Person Search Keywords scheduled processes to fetch any missing information.

For more information on the Reporting Hierarchy Generation, see [How do I generate the resource reporting hierarchy?](#).

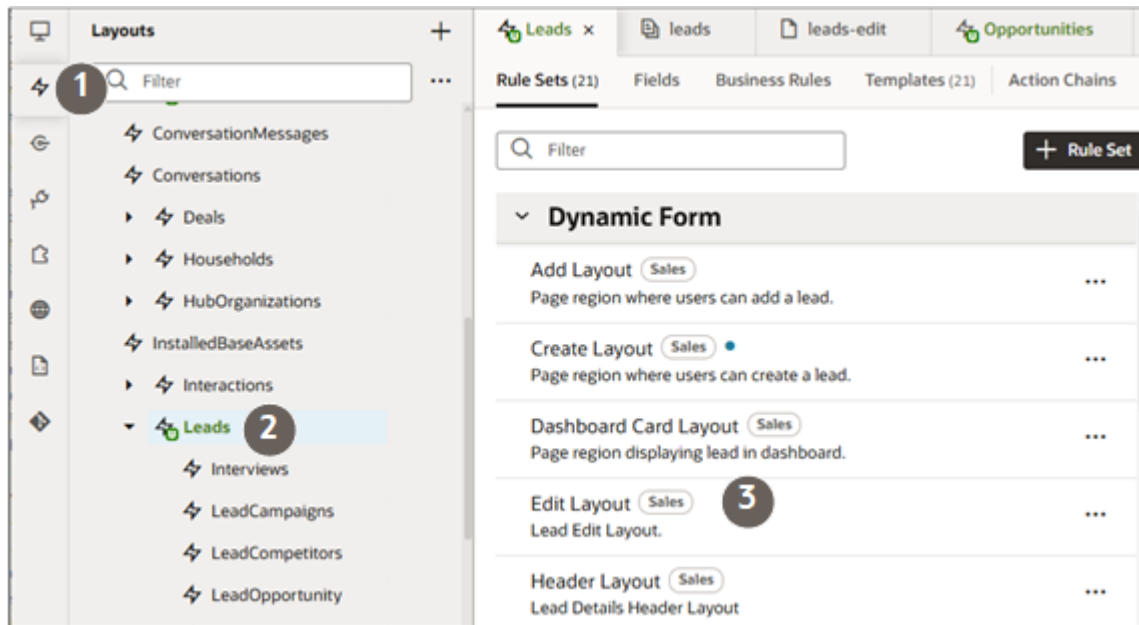
## How can I add the attachment field to the Edit pages in Oracle Sales in the Redwood User Experience?

Here's how you can use Oracle Visual Builder Studio to incorporate an Add Attachment button on Edit pages, enabling salespeople to add and view attachments directly from those pages. By default, salespeople can add attachments by entering **Show attachments** in the Action Bar. While we're using the Edit Lead page as an illustration, the same setup process is applicable to other sales objects as well.

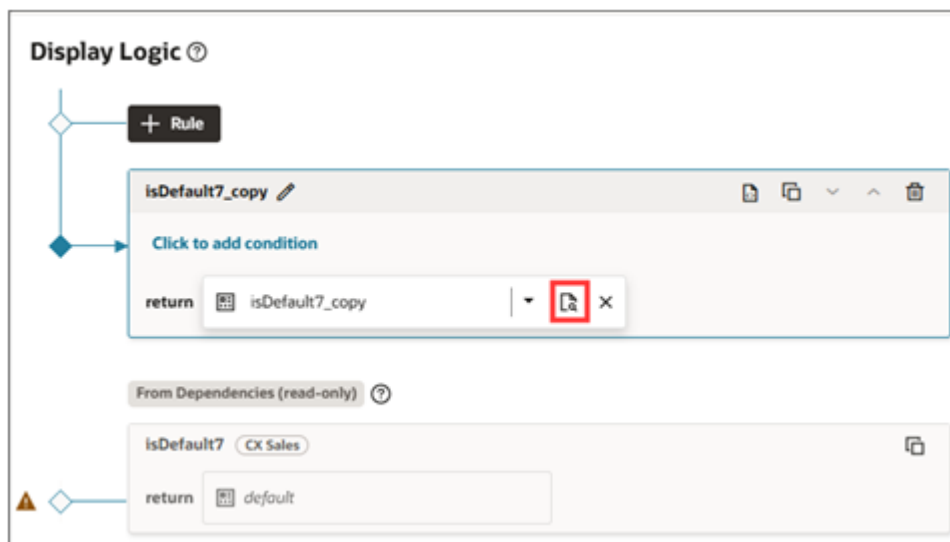
1. Open the Leads list page (or the list page of another sales object).
2. Drill down into a record and click the **Details** button to open the edit page.
3. In the **Settings and Actions** menu, click **Edit Page in Visual Builder Studio**.
4. Click the **Layouts** tab (callout 1 in the screenshot)
5. Open the **Sales** node and click **Leads** or another object (callout 2).



6. Under the **Dynamic Form** heading, click **Edit Layout** or another layout where you want to add the field (callout 3).



7. In the Display Logic section, click **Duplicate Rule** on the default layout to create your own layout.
8. In the Duplicate Rule dialog box:
  - a. Optionally, enter a different name.
  - b. Leave the **Also create a copy of the layout** option selected.
  - c. Click **Duplicate**.
9. On your duplicate, click **Open** (the icon highlighted in the following screenshot)



10. On the **Fields** tab, search for **Attachments** (callout 1 in the following screenshot) and select the attachment field at the top of the list.

**Note:** The field name is slightly different for each object. For leads, the field name is **AllLeadAttachments**. For accounts, it's **Attachment**.

11. Select and drag the field to the desired location in the **Select fields to display** section (callout 2).
12. With the attachment field selected (callout 3), click the **Create** link next to the **Template** field in the right pane to create a field template (callout 4).

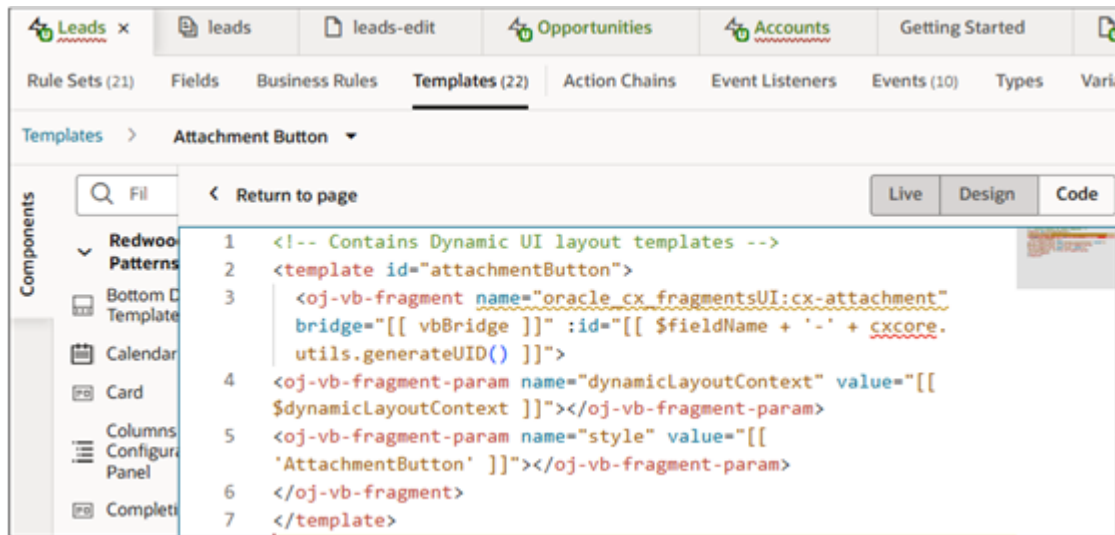
The screenshot shows the Oracle Fusion Cloud Sales Automation interface. The top navigation bar includes tabs for Leads, Opportunities, Accounts, and Getting Started. The main area is divided into several sections. On the left, under 'Fields', there is a search bar (callout 1) containing 'AllLeadAttachments'. Below it, a list of fields is shown, with 'AllLeadAttachments' selected (callout 2). In the center, the 'Select fields to display' section shows a list of fields, including 'AllLeadAttachments' (callout 3). On the right, the 'Form' pane shows the 'Field' section with a 'Template' dropdown menu. The 'Create' link next to the 'Template' field is highlighted (callout 4).

13. In the Create Template box, enter a **Label** for the template, for example **Attachment Button** and an **ID** such as **attachmentButton**.
14. Leave the **Enable Extensions** checkbox selected.
15. Click **Create**.
16. In the **Templates** subtab, edit the template you just created.
17. Between the Template tags, paste in the following code:

```
<oj-vb-fragment name="oracle_cx_fragmentsUI:cx-attachment" bridge="[[vbBridge]]" :id="[[$fieldName +
'- ' + cxcore.utils.generateUID()]]">
<oj-vb-fragment-param name="dynamicLayoutContext" value="[[$dynamicLayoutContext]]"></oj-vb-fragment-
param>
<oj-vb-fragment-param name="style" value="[['AttachmentButton']]"></oj-vb-fragment-param>
```

</oj-vb-fragment>

Your attachment template code should look similar to this:



18. Click **Preview** at the top of the page to test the button you added on the page.

## Can I remove the Sales Catalog and Product Structure sections of the Create Product page in Oracle Sales in the Redwood User Experience?

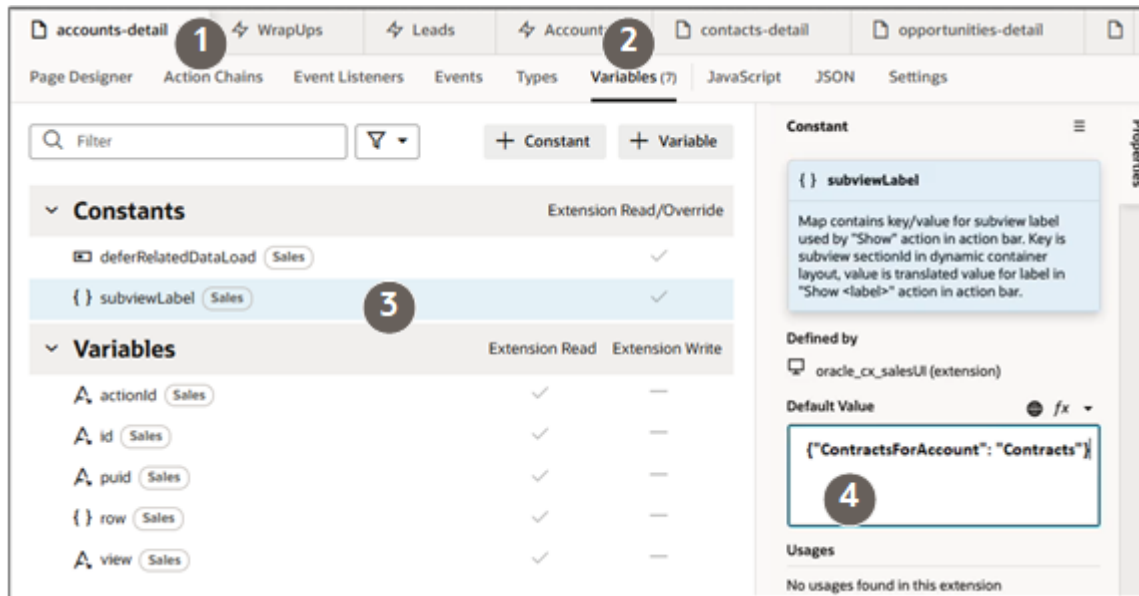
No, you can't remove these sections. Any product you create must be part of the Sales Catalog for it to be available for sale.

## How do I rename the Show action for a custom object related to an account?

When you create a custom object and link it to a standard object such as an account, the "Show" action includes the name of the relationship rather than the name of the object itself. For example, a custom object named Contract, displays "Show ContractsForAccount" (the name of the relationship) in the Action Bar instead of "Show Contracts". You can fix the action names by changing the **SubViewLabel** variable in Oracle Visual Builder Studio. Here's a step-by-step guide on how to achieve this update.

1. Open the Accounts list page (or the list page of another sales object).
2. Drill down into a record and click the **Details** button to open the edit page.
3. In the **Settings and Actions** menu, click **Edit Page in Visual Builder Studio**.
4. Click **Accounts-detail > Variables** and select the **Subview Label** constant. (Callouts 1 to 3 in the screenshot).

5. In the **Default Value** field (callout 4 in the screenshot), enter the following: `{"<RelationshipName": "<DisplayName>"}` In this example: `{"ContractsForAccount": "Contracts"}`.



**Note:** Instead of hard-coding a value, you can create and enter a translation bundle. For translation information, see the [Work with Translations](#) topics in the Extending Oracle Cloud Applications with Visual Builder Studio guide. The [Translate Strings for Redwood UI Extensions video on Oracle Cloud Customer Connect](#) walks you through an example.

## Does an opportunity revenue fact in my OTBI analysis convert foreign currency to USD?

If you set up currencies and exchange rates, then the opportunity revenue facts that you include in your Oracle Transactional Business Intelligence (OTBI) analyses display amounts in the user's preference currency.

### Related Topics

- [Currency and Exchange Rate Settings for Analytics](#)

## How do I log calls in the Redwood User Experience to record my interactions with customers or prospects?

We can log communications such as call, web conference, and email with customers or prospects as interactions in the Redwood User Experience.

Interactions are of two types: wrap-ups and conversation messages. Wrap-ups are for non-threaded communication types like phone calls and web conferences. Conversation Messages are for threaded types, namely emails which can be intrinsically replied to. Both of these types have an interaction header as the basis for the record.

## Enable Sales Team to Log Interactions

To enable logging interactions, grant the required privileges and configure the setups outlined in the table here:

| Prerequisite                                | Prerequisite Type           | Description                                                                                                                                                                                         | What You Need to Do                                                                                                                                                    |
|---------------------------------------------|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ZCM_MANAGE_SALES_INTERACTIONS_PRIV          | Role Privilege              | Enables your users to log interactions.                                                                                                                                                             | Add the privilege to the users with the sales administrator, sales manager, and salesperson roles.                                                                     |
| ORA_ZCA_ENABLE_TRACKING_EMAIL_CONVERSATIONS | Profile Option              | Enables users to share emails as conversations from the Microsoft 365 add-in and see them in the Interactions History subtab.                                                                       | Set it to Y or Yes.                                                                                                                                                    |
| ORA_ZCA_ENABLE_TRACKING_INTERACTIONS        | Profile Option              | Enables users to see emails and call logs in the Interactions History subtab instead of activities.                                                                                                 | Set it to Y or Yes.                                                                                                                                                    |
| SVC_MCA_RECORD_ACTIVITIES_YN                | Profile Option              | Generates tasks and call reports automatically and shows them on the Activities tab. See the topic <i>How do I configure Multichannel Architecture (MCA) profile options?</i> for more information. | Set it to <b>No</b> .                                                                                                                                                  |
| Interactions History                        | Subtab on the object pages. | From this subtab, you can review all the previous interactions and add call logs and emails manually to an opportunity or a lead.                                                                   | Enable this subtab on the relevant object pages. See <i>How to Add the Interactions History Subtab to Opportunities</i> for more information.                          |
| Log an Interaction                          | Smart action for Workspace. | Users can log interactions from the object pages of Workspace.                                                                                                                                      | Enable the smart action on relevant object pages of Workspace from the Application Composer. See the topic <i>Manage Workspace Smart Actions</i> for more information. |
| Log a Call                                  | Smart action for Workspace. | Users can log a call from the object pages of Workspace.                                                                                                                                            | <b>Disable</b> the smart action for all the objects.                                                                                                                   |

## Where can Salespeople See and Log the Interactions

After you complete the setup, the calls and emails logged from the object pages of sales application will be available in the Activities panel of the object foldout view in Digital Sales. Similarly, the calls and emails logged from Digital Sales will be available in the Interactions History subtab of the object pages in the CX Sales application.

Calls and emails logged prior to enabling interactions remain in Activities and are available for historical context.

Salespeople can log the interactions using the:

- Log an Interaction button on the Interactions History subtab of the object pages of the sales application.
- Log an email button on the Interactions History subtab of the object pages of the sales application.
- Log an Interaction smart action from the Workspace action menus on all the relevant object pages of Workspace.

**Note:** Salespeople won't be able to log a call from activities or use the Log a Call smart action on the object pages of Workspace.

## Log Interactions You Had with Customers

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

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

Here's how you log an interaction:

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

You can see the interactions logged by your team.

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

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

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

## Can we identify duplicate accounts before importing data from a CSV file?

Duplicate Identification can't run against a CSV file before importing the data in the file.

Duplicate Identification batches run only on data in Oracle Fusion applications. The duplicate identification feature works on composite keygen settings that are part of the persisted data model and aren't present or calculated for data in the CSV during the import process.

## Can I use both household and account simultaneously in CX Sales?

There is no limitation to using household with accounts or contacts simultaneously.

In Oracle Fusion applications, household is a group.

## How can I create rules to merge prospects and customers using CDM?

Merging involves combining duplicate records into one new master record. You can configure it using by setting up survivorship and agreement rules using Groovy Script in Application Composer.

For more information about configuring merges using Groovy Scripts, see [How you Configure Merges Using Groovy Scripts](#)

## Can territory assignment automatically assign accounts based on a non primary address?

No, territory assignment automatically assigns accounts based only on the primary address attribute. You can manually assign a different address to an account to suit your requirement. After you set up your territories, territory-based assignment matches territory dimensions and attributes to work objects.

You can set up territory-based assignment to be completely automated, to happen on-demand, or you can use a combination of these settings. Territory-based assignment requires that you set up your territories and resource hierarchy, set profile options to configure assignment, and run assignment processes. With territory-based assignment, you typically create a mapping set between a work object and a candidate object to make the appropriate candidate assignment. This mapping set can consist of one or more mappings between the work object attributes and the territory candidate object attributes.

Territories are automatically assigned to accounts when:

- Accounts are created.
- A sell-to address is added to an existing sales party.
- Accounts are imported in bulk.
- Certain attributes on accounts that correspond with territory assignment dimensions are updated.
- Batch assignment is run.
- You select the **Assign Territories** menu action on the **Sales Account Team** node for the account.
- Territories are realigned or when personnel leave the territory or the company.

- A sales manager reassigns all the sales representative's account to a different owner that triggers the reassignment of territories for those accounts to the new owner.

The following profile options decide whether territory assignment and reassignment is automatic for accounts. The default setting for both is YES.

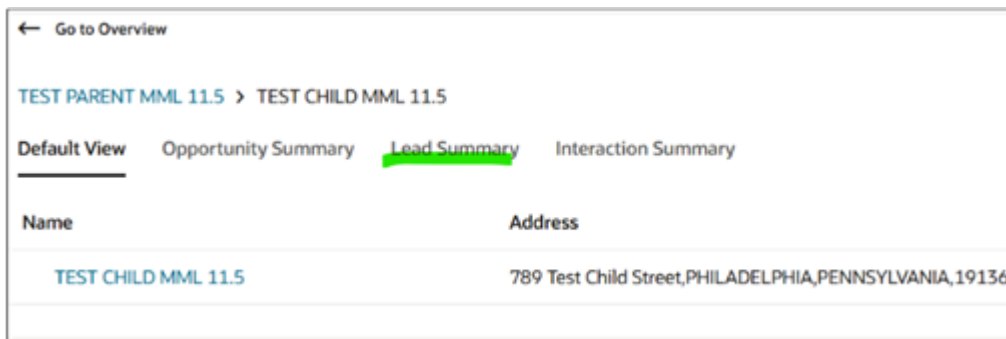
- Sales Account Automatic Assignment on Create Enabled
- Sales Account Automatic Assignment on Update Enabled

Automatic assignments are always enabled following an import, party merge and territory realignment.

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 might need to provide the legal department with access to certain opportunities.

## How can I remove the Lead Summary heading from the Account Hierarchy subview?

Here's how to remove the Lead Summary heading.



1. In Oracle Visual Builder Studio, go to **accounts-detail** page and duplicate the **SubviewControllerLayout**.
2. Duplicate the section template **Account Hierarchy Subview Template** (accountHierarchySubviewTemplate). Give the template a new ID such as **accountHierarchySubviewTemplate2**.
3. On the page JSON tab, in the **SubviewControllerLayout sectionTemplateMap**, update "hierarchy": "accountHierarchySubviewTemplate" with the new ID: "hierarchy": "accountHierarchySubviewTemplate2",. Make sure there's only one entry for "hierarchy" and that **displayProperties** still include "hierarchy" and no other new entry.
4. In the page HTML file, make the following changes to the **cx-hierarchy** fragment in the duplicated section template:
  - a. In the **types parameter > items** array, remove the entry with ID **HierarchySubViewTableLeadLayout**.
  - b. Replace **\$page.variables** with **\$base.variables**
  - c. Make sure **\$translations** are valid by adding the following resource bundles to the page JSON: "translations": { "partiesResourceBundle": { "path": "faResourceBundle/nls/oracle.apps.cdm.foundation.parties.resource" }, "insideSalesGenBundle": { "path": "faResourceBundle/nls/oracle.apps.crmCommon.insideSales.resource" } }



The updated section of the template should look something like the following:

```
<template id="accountHierarchySubviewTemplate2">
 <oj-vb-fragment bridge="[vbBridge]" name="oracle_cx_fragmentsUI:cx-hierarchy">
 <oj-vb-fragment-param name="resource" value="[{ {name: 'accounts', id: $base.variables.id, puid:
 $base.variables.puid} }]"></oj-vb-fragment-param>
 <oj-vb-fragment-param name="style" value="['Subview']]"></oj-vb-fragment-param>
 <oj-vb-fragment-param name="modes" value="[[{id: 'table', title:
 $translations.partiesResourceBundle['AltTxt.Treetableview'], icon: 'oj-ux-ico-list', isDefault:
 true}, {id: 'viewer', title: $translations.partiesResourceBundle['AltTxt.Gridview'], icon: 'oj-
 ux-ico-networking', isDefault: false}]]"></oj-vb-fragment-param>
 <oj-vb-fragment-param name="types" value="[{style: 'tab',
 items: [{id: 'HierarchySubviewTableDefaultLayout', title:
 $translations.insideSalesGenBundle['Header.DefaultView'], modeId: 'table',
 isDefault: true}, {id: 'HierarchySubviewTableOpportunityLayout', title:
 $translations.insideSalesGenBundle['MenuItem.OpportunitySummary'], modeId:
 'table', isDefault: false}, {id: 'HierarchySubviewTableInteractionsLayout', title:
 $translations.insideSalesGenBundle['MenuItem.InteractionSummary'], modeId: 'table', isDefault:
 false}]]"></oj-vb-fragment-param>
 </oj-vb-fragment>
</template>
```

## Does the Oracle CX Sales or Customer Data Management have the feature to automatically detect duplicate lead or opportunity records?

No, Oracle CX Sales or Customer Data Management don't have the feature to automatically detect duplicate lead or opportunity records.

They don't have the feature to display a pop-up notification with options to merge or close the duplicate. However, leads has the option to check for duplicates. For more information about duplicate checking of leads, see [How can I check for duplicate leads?](#)

## How you protect Personally Identifiable Information?

The data or information that's used to uniquely identify a contact, or locate a person is called personally identifiable information (PII). Examples are social security number, addresses, bank account numbers, phone numbers, and so on.

This information is considered confidential and sensitive, and must be protected to prevent unauthorized use of personal information for the purposes of legal regulation, financial liability, and personal reputation. For example, only authorized users must be allowed access to the social security numbers of people stored in a system.

In Oracle Applications Cloud, the PII data is secured and can be accessed only by the following job roles with the exception of mobile phone data:

- Sales Administrator
- Enterprise Scheduler Job Application Identity for CRM
- Oracle Data Integrator Application Identity for CRM

- Web Services Application Identity for CRM

Mobile phone data is accessible to all seeded job roles. However, if access to mobile phone data is needed for custom job roles, the IT Security Manager must assign the required PII data policies to the custom job role in the Security Console. The IT Security Manager can also add data policies for other PII data to seeded job roles.

The following table lists the PII attributes that are secured in Oracle Applications Cloud.

**Note:** You can search privileges in Security Console using the Privilege Titles listed in the following table.

| PII Attribute                                           | Table Name                                                                                                  | Privilege Title                                     |
|---------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|-----------------------------------------------------|
| Taxpayer Identification Number (Social Security Number) | HZ_PERSON_PROFILES                                                                                          | View Trading Community Person Social Security       |
| Taxpayer Identification Number (Social Security Number) | HZ_PERSON_PROFILES                                                                                          | Manage Trading Community Person Social Security     |
| Citizenship Number                                      | HZ_CITIZENSHIP                                                                                              | View Trading Community Person Citizenship Number    |
| Citizenship Number                                      | HZ_CITIZENSHIP                                                                                              | Manage Trading Community Person Citizenship Number  |
| Home Address                                            | HOME Address is identified by party site use defined in SITE_USE_TYPE field of the HZ_PARTY_SITE_USES table | View Trading Community Person Address               |
| Home Address                                            | HOME Address is identified by party site use defined in SITE_USE_TYPE field of the HZ_PARTY_SITE_USES table | Manage Trading Community Person Address             |
| Home Phone                                              | HZ_CONTACT_POINTS rows with contact_point_purpose value PERSONAL                                            | View Trading Community Person Contact               |
| Home Phone                                              | HZ_CONTACT_POINTS rows with contact_point_purpose value PERSONAL                                            | Manage Trading Community Person Contact             |
| Mobile Phone                                            | HZ_CONTACT_POINTS rows with phone_type or phone_line_type value MOBILE                                      | View Trading Community Person Mobile Phone Number   |
| Mobile Phone                                            | HZ_CONTACT_POINTS rows with phone_type or phone_line_type value MOBILE                                      | Manage Trading Community Person Mobile Phone Number |
| Home Email                                              | HZ_CONTACT_POINTS rows with contact_point_purpose value PERSONAL                                            | View Trading Community Person Contact               |
| Home Email                                              | HZ_CONTACT_POINTS rows with contact_point_purpose value PERSONAL                                            | Manage Trading Community Person Contact             |

| PII Attribute          | Table Name                                                  | Privilege Title                                       |
|------------------------|-------------------------------------------------------------|-------------------------------------------------------|
| Additional Identifiers | All rows that belong to PERSON party in HZ_ADDTNL_PARTY_IDS | View Trading Community Person Additional Identifier   |
| Additional Identifiers | All rows that belong to PERSON party in HZ_ADDTNL_PARTY_IDS | Manage Trading Community Person Additional Identifier |

## What roles can I assign duplicate identification batches?

To assign a user to a Duplicate Identification Batch or Duplicate Resolution Request, the user must also be a Resource with the corresponding Resource Role.

The following security roles can access CDM:

- Data Steward Manager (ORA\_ZCH\_DATA\_STEWARD\_MANAGER\_JOB)
- Customer Data Steward (ORA\_ZCH\_TRADING\_COMMUNITY\_DATA\_STEWARD\_JOB)
- Customer Data Management Administration (ORA\_ZCH\_CDM\_ADMIN\_DUTY)

## How do I add a To Date for attributes on CDM pages?

You can add a To Date for attributes on the CDM pages using the Application Composer.

In this topic we will add the end date for location on an organization.

1. Go to **Navigator > Configuration > Application Composer > Sandboxes** to create a new publishable sandbox.
2. Click Create Sandbox.
3. Specify a name and select Application Composer All Tools. Also select the Publishable option as Yes.
4. Click Create and Enter.
5. Click the Application Composer icon.
6. Expand **Address > Pages**.
7. Click Desktop pages.
8. Click Edit Address Creation Region in the Details Page section.
9. Click To Date.
10. Click Save and Close.
11. Click Edit Address Summary Table in the Overview Page section.
12. Click To Date.
13. Click Save and Close.

Publish the sandbox after completing all your changes.

## How do I cancel or make changes to scheduled processes that are submitted to run on a recurring schedule?

First, if you can, find the process that was submitted on a recurring schedule by its process ID.

If you don't have the process ID, here's how you find it:

1. In the Scheduled Processes work area, search by the process name, the Wait status, and a submission time before the current date.
2. For the search results, select **Hierarchy** for the **View** option.
3. Select the parent node that represents the process submitted to run on a schedule.

With the process selected in the Search Results table, select what you want to do from the Actions menu. For example, **Edit Schedule** to change the end date or frequency, or **Cancel Process** to cancel the original submission and all remaining runs.

If the **Edit Schedule** option isn't available, it's likely that the process was submitted outside the application, for example through a SOAP web service. And, the schedule was defined with iCalendar in a way that doesn't map to what you can define on the Edit Schedule page.

## Why am I seeing records that have already been deleted?

This message appears when you access any deleted or inactive record.

As a Data Steward, you can look for inactive records and when you access these records you get this message.

## How can I set quotas for products in Oracle Sales in the Redwood User Experience?

For setting quotas on products, you should consider Oracle Cloud EPM Planning. This offering provides *AI-driven predictive planning capabilities*.

## Is there a limit to the number of inclusion customers in a sales territory?

No, there's no limit to the number of customers you can add to sales territories using inclusion in Oracle Sales.

