Oracle Fusion Cloud Sales Automation

How do I get started with the Sales Catalog?

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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.

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Thanks for helping us improve our user assistance!

1 How do I get started with the Sales Catalog?

Overview of the Sales Catalog

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

The sales catalog consists of a hierarchy of product groups. This hierarchy classifies and organizes the products in your catalog.

In addition:

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

Using Products in the Sales Catalog

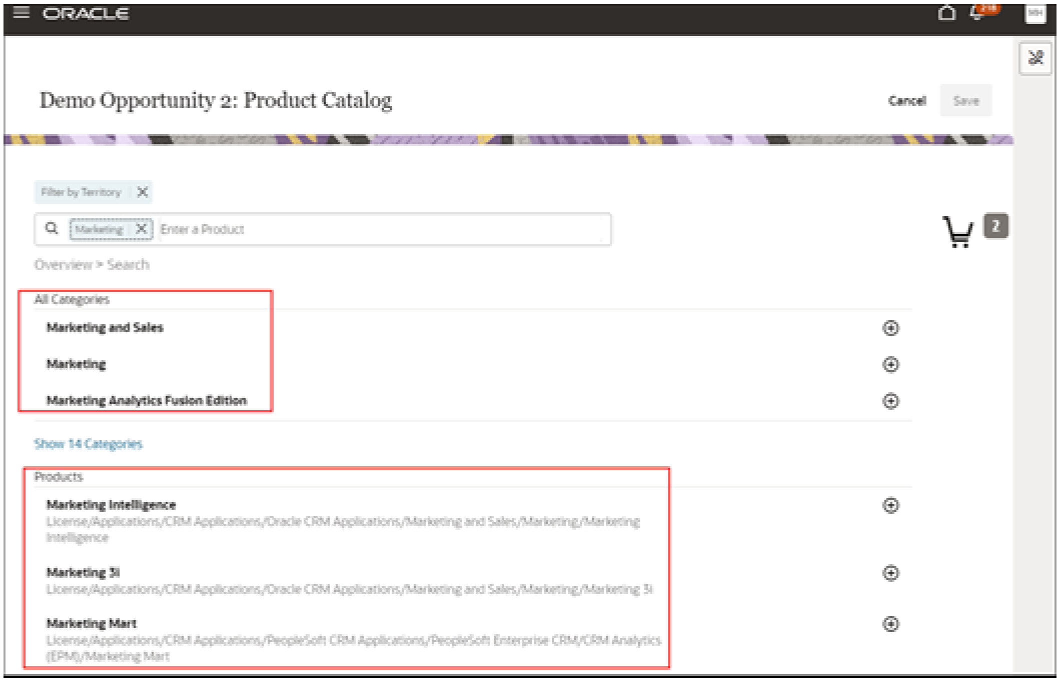
While you can create the sales catalog with only product groups, you must use products to take advantage of advanced sales features, such as price books. You must also use products to enable integrations with other Oracle cloud services, including Oracle Configure, Price, and Quote (Oracle CPQ). You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

The products that you create get stored both in Sales and in Oracle Product Information Management (also called PIM or the Product Model). The product model serves as the master item repository for all front-office cloud services.

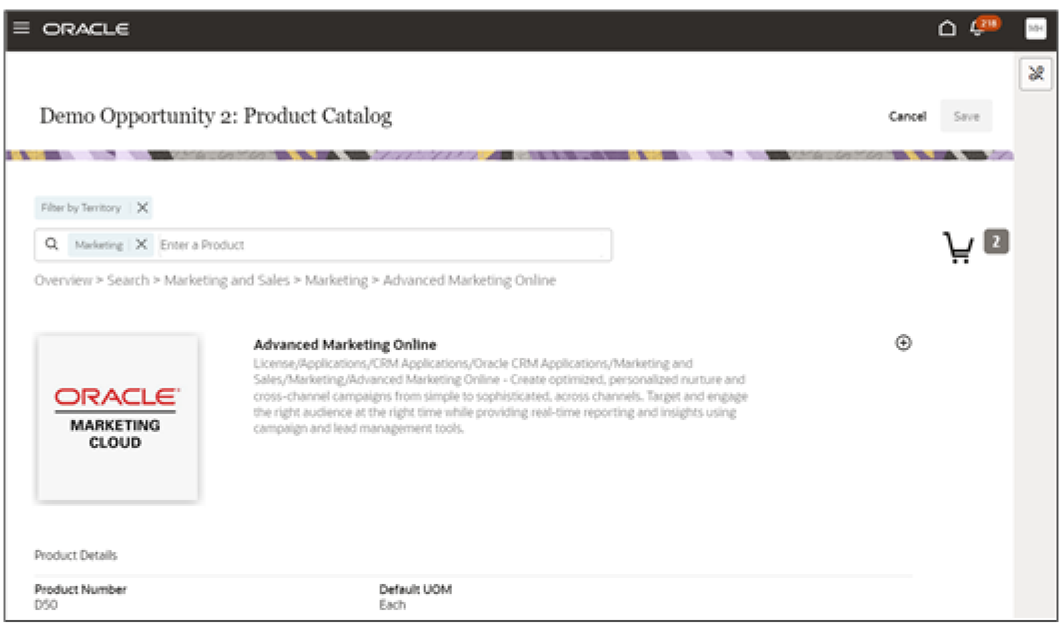
For more information on the integration with the Product Model and Oracle CPQ, see *Sales and Service Catalogs* and *How Sales Products and SCM Cloud Products Work Together*.

Sample Sales Catalog Flow and Structure

The Product Catalog page gives salespeople a simplified shopping cart experience. They can search for a product and browse the product group hierarchy to add products to a lead or opportunity. This screenshot highlights three product groups in the All Categories section and also individual products in the Products section.



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



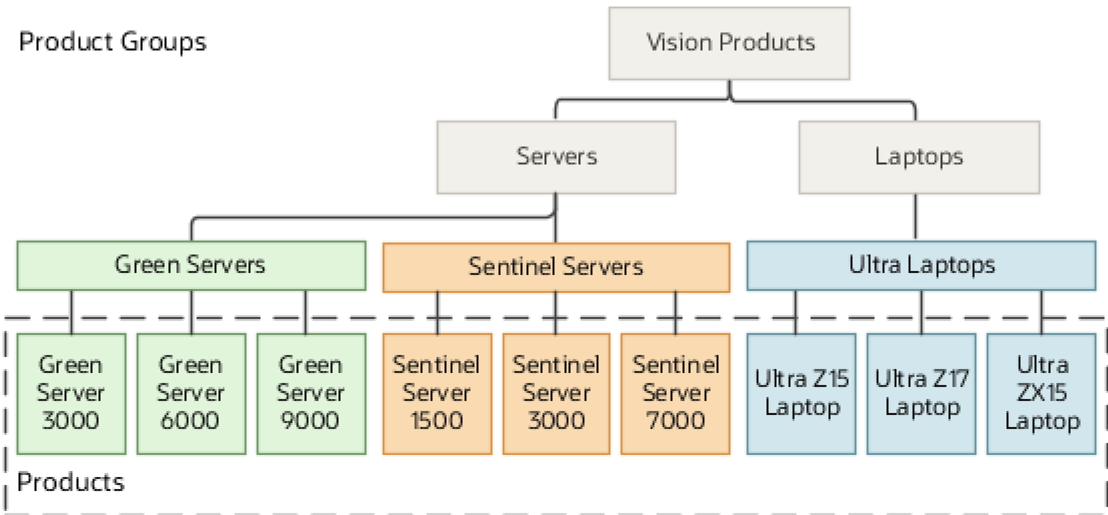
For example, the fictitious Vision Corp. uses product groups to assign specialists to help close deals on opportunities. They use a line of servers that the company has just launched. The company also creates forecasts for each server line.

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

1. Uses Vision Products as the root product group.
2. Imports the products underneath Vision Products.

3. Imports the remaining product groups and their associations with the products.

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



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

Sales and Service Catalogs

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

There are two differences between sales and service catalogs:

- How product groups are used.

  In sales, you can forecast by product groups and use product groups for assigning opportunities. In service, you can use product groups to channel service requests to the right work queue for resolution.

- Different product options determine if the product shows up for sales or for service.

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

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

Products in the Sales and Fusion Service Catalogs

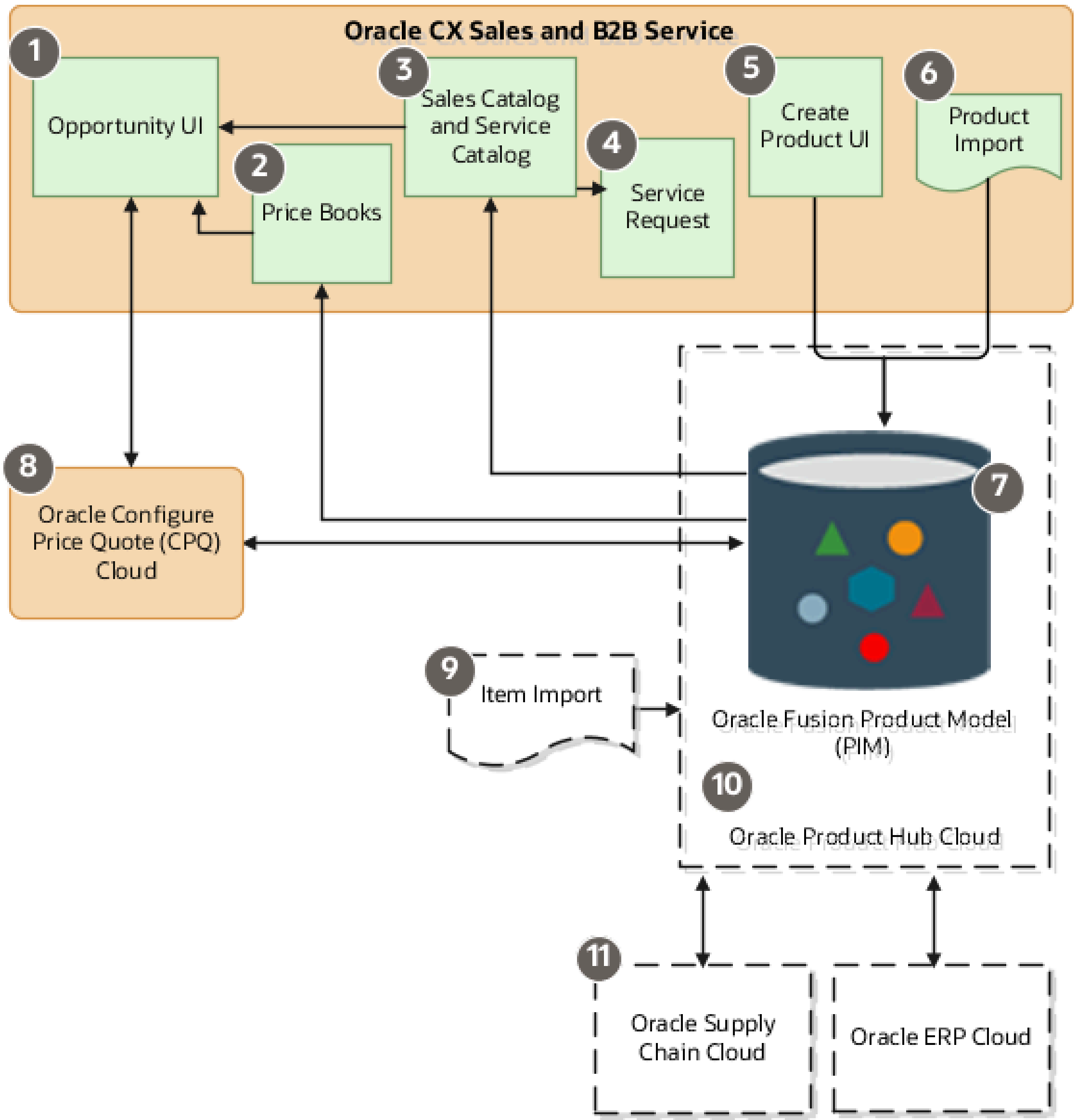
While you can create sales and service catalogs with product groups only, you must create products to take advantage of advanced sales features such as price books. You must also use products to enable integrations with other Oracle cloud services, including Oracle Configure, Price, and Quote (CPQ) Cloud.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

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

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

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

- In Oracle CX Sales and Fusion Service, you can create the products for your sales and service catalogs either individually in the UI (indicated by callout 5) or you import products from a file (callout 6).
- Product records are created both in Sales and Fusion Service and in the Oracle Fusion Product Model (callout 7).
- You expose the products in the sales or service catalogs (callout 3) by associating them with product groups.
- Salespeople can browse or search the sales catalog from the Opportunity UI (callout 1) and select the products the customer is interested in buying. Only products with the Eligible to Sell option selected appear in the sales catalog.
- Service agents enter products from the Service Request UI (callout 4). Only products with the Eligible for Service option selected appear in the service catalog.
- You can price the products using price books (callout 2), or create quotes for them in Oracle Configure, Price, and Quote Cloud (callout 8). Price books and CPQ Cloud require additional integration, so aren't covered in this guide. (Although price books are a sales feature, you must integrate them with opportunities using Groovy scripting.)
- The Oracle Fusion Product Model (callout 7) forms the foundation of the Oracle Product Hub Cloud (callout 10), a powerful product management application designed for supply chain, order management, and inventory tasks, which must be licensed separately. Because the sales application uses less than a dozen of the hundreds of the item attributes that can be captured in Oracle Product Hub, you can't use the sales UIs or product import if you're implementing Oracle Product Hub Cloud. To create products in Oracle Product Hub Cloud that can be used with Oracle Supply Chain Cloud or Oracle ERP Cloud (callout 11), you must use the Oracle Product Cloud Hub UI and item import (callout 9).



Related Topics

- Can I set up a Service catalog after I've already created the root group in Sales?

Overview of Sales Catalog Setup

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

The Setup Assistant:

- Creates the root product group.

- Creates all the prerequisites for creating and importing products. This includes creating the required item master organization and the units of measure provided by Oracle Fusion Product Model.
- Enables the sales catalog for use by selecting the root node as the "Base usage". This step tells the application which product groups to display in the sales catalog.
- Runs the scheduled process, Refresh Denormalized Product Catalog Table for BI. This process must be run each time you change the base usage.

Sales Catalog Setups to Do Manually

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

Note: This guide explains how to create products in your catalog by importing them. For information about creating individual products in the UI, start with *Sales Products High-Level Setup Steps*.

Description	Where to Find More Information
Step 1 Review the units of measure to make sure you have all you need.	*Review Units of Measure (UOMs) for Products*
Step 2 From My Oracle Support, download Excel files containing import macros and the `.jar` file. You need these files to import products and product groups. Importing the sales catalog involves four steps using separate macros:	*Download the Product Import Files*
Enter product information in the product import macro and import the products.	*Enter Data into the Product Import Macro and Import*
Verify the products you imported in the Products work area and, optionally, add product images.	*Verify Imported Products and Add Product Images*
Import the relationships between product groups and products.	*Import the Relationships Between Product Groups and Products*
Obtain the reference number for the root product group Setup Assistant created for you. You need the reference number to create the link between the root and the product groups you import.	*Obtain the Reference Number for the Root Product Group*
Enter the product group hierarchy information.	*Import Product Group Hierarchy Information*
Validate the sales catalog on the Manage Product Groups page.	None

Description	Where to Find More Information
If using classic Sales, enable browsing of the sales catalog while editing opportunities by setting the profile option Browse Sales Catalog in Opportunities Enabled. There's no setup needed to set up the browsing of the catalog in the Redwood UX version.	*Enable Sales Catalog Browsing in Opportunities (Classic Sales Only)*
Sign in as a sales user and validate that your sales catalog shows up in opportunities.	*Validate the Sales Catalog*
Let salespeople filter the catalog display by only their own territories or with products or product groups from all territories they have access to.	• *Territory Filtering of Products in the Catalog* • *Set Territory Filter Options*

Review Units of Measure (UOMs) for Products

The sales organization uses units of measure (UOMs) to sell and price the products in the Sales Catalog. The Setup Assistant automatically creates the default UOMs provided by Oracle SCM Cloud for you. Use this step to review the default setup.

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

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

Import Products and Product Groups

Overview of Importing Products and Product Groups

To import products and product groups for the Sales Catalog you use Excel files containing macros that Oracle has provided. Using the macros greatly speeds up the creation of your product data.

Here's an overview of the steps:

1. Download the import files. See: *Download the Product Import Files*
2. Enter product data and import the products. See: *Enter Data into the Product Import Macro and Import*.
3. As a checkpoint, you verify the imported products and optionally add images to products. See *Verify Imported Products and Add Product Images*.
4. Import the product groups. See: *Enter Data into the Product Import Macro and Import*.

5. Import the relationship between the products and product groups. In this step, you specify which products belong in which product groups. See: *Import the Relationships Between Product Groups and Products*
6. Find the reference number to use when you import the product group structure. See: *Obtain the Reference Number for the Root Product Group*
7. Import the product group hierarchy. See *Import Product Group Hierarchy Information*

Download the Product Import Files

Download the product and product group import files. These four Excel spreadsheets contain macros that let you do the product data import.

> **Note:** This section focuses on importing your product data using Excel files with macros. See the *Understanding Import and Export Management* guide to learn how to import product data without the macros.

Importing products and product groups applies to both classic Sales and Sales in the Redwood UX.

For information about how to create individual products in the UI, start with *Sales Products High-Level Setup Steps*.

Here are the steps to download the Excel import files:

1. Sign in to *My Oracle Support*.
2. Search for the document, *Oracle Sales: Download the Import Files (KB171529)*.
3. Download the files shown in the following table to a folder on your computer. You can create different folders for the different files, as long as the Product Import Macro folder includes the `.jar` file.

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

Enter Data into the Product Import Macro and Import

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

1. Open the Product Import Macro file you downloaded earlier.
2. Make sure macros are enabled in Excel.
3. On the UOM worksheet, click **Populate UOM from Server**.
4. On the Login page, enter the following:

ORACLE

- Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/`.
- Your user name
- Your password

5. Click **Submit**.

   The macro retrieves the units of measure you set up from your environment and enters them into the worksheet so they're available as the list of values in the Primary UOM field in the Template worksheet.
6. The Product Type worksheet lists the predefined product types that you can use to classify your products. You can update this list using the following steps.

   > **Note:** You can skip this step if you haven't created new product type values in the lookup type, QSC_SALES_PRODUCT_TYPE.

   a. Click **Populate Product Type from Server**.
   b. The Login window still contains the host, user name, and password you entered before, so click **Submit**.

      The macro retrieves the latest product types from your environment and enters them into the worksheet so that they're available as the list of values in the Product Type field in the Template worksheet.
7. To import additional fields, then do the following:
   a. Click the **Attributes Mapping** tab.
   b. Click **Fetch Attributes from Server**.
   c. In the Login window, enter the following:
      - Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/`.
      - Your user name
      - Your password

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

   Here are the details for each existing product attribute:

Column	What to Enter
Product Number	You can enter the unique product number of the product or leave this required column blank. If you don't enter a product number, then the macro generates the product number automatically using the date and time. The product number displays in the product records that are visible in the Products work area. The application uses the product number to identify the product record for updates.

Column	What to Enter
Name	The product name as it appears in the sales catalog.
Description	Enter a text description.
Primary UOM	Unit of measure. One of the values in the UOM worksheet.
Product Type	Product type. One of the values in the Product Type worksheet.
Eligible to Sell	Enter `Y` to make the product appear in the sales catalog and to associate it with product categories. If you don't make an entry in this column, then the macro automatically populates the value of `Y`. A value of `N` imports the product, but doesn't show it in the catalog or make it available for selection by salespeople.
Eligible for Service	This column is used only if you're integrating with the Oracle Fusion Service. A value of `Y` enables service requests for this product. If the product is not eligible for service, then enter `N`. If you leave this column blank, then the macro automatically populates the value of `Y`.
Enable Customer Self-Service	This column is used only if you're integrating with the Oracle Fusion Service. Enter `Y` to enable customers to view the product on the self-service portal. Otherwise enter `N`. If you leave this column blank, then the application populates an N for products of the following product types: ◦ Extended Warranty ◦ Included Warranty ◦ Preventive Maintenance ◦ Service Level Agreement ◦ Software Maintenance You can't enter a value of `Y` for these product types into the macro. The macro enters a `Y` for the rest of the product types supplied by Oracle. You must provide a value for any product types you created.

9. When you're done with your entries, click **Create Import Activity**.

10. If you're prompted to correct errors, here's what to do:
    a. Click **OK**

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

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

    The application displays one of these messages:

Message	Meaning
The file import activity was submitted successfully.	Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.
Unable to connect to the server at this time.	You might have entered an incorrect host.
Unable to submit the file import activity. Check log for details.	Open the Errors work sheet to view the error details.

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

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

    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is Completed.
14. Optionally, click **Generate Log** to save a file listing the products that were imported.

Verify Imported Products and Add Product Images

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

Note: You can only include one image for each product.

1. Navigate to the Products work area in Sales.
2. Search for and select the product you want to add an image to.
3. Add the image as an attachment and save your changes.

Import Product Groups

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

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

   Here are the details of each column:

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

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

      The Error worksheet displays your errors.

   b. Click each error link and make the correction.

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

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

The application displays one of these messages:

Message	Meaning
The file import activity was submitted successfully.	Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.
Unable to connect to the server at this time.	You might have entered an incorrect host.
Unable to submit the file import activity. Check log for details.	You most likely entered the wrong mapping number or the user doesn't have the correct permissions. Open the Errors work sheet to view the error details.

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

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

   - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
   - If your import completed successfully, then the status listed is Completed.
9. Optionally, click **Generate Log** to save a file listing the product groups that were imported.

Import the Relationships Between Product Groups and Products

Import the relationship between product groups and products.

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

1. Open the file `ProductGroup_Import_Macro.xlsm` with the product groups you just imported. You use the product group reference numbers to identify the product groups.
2. Open the `Product_Import_Macro.xlsm` file with the products you imported. You use the product numbers in this file to identify the products.
3. Open `ProductGroupItem_Import_Macro.xlsm`.
4. Make sure macros are enabled in Excel.
5. In the `ProductGroupItem_Import_Macro.xlsm` file, for each product, enter the product group reference number and the product number.
6. When you're done with your entries, click **Create Import Activity**.
7. On the Login page, enter the following:
   - Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/sales`.
   - Your user name
   - Your password
8. Here's what to do if you're prompted to correct errors in your entries:
   a. Click **OK**.

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

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

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

9. Click **Submit**.

   The application displays one of these messages:

Message	Meaning
The file import activity was submitted successfully.	Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.
Unable to connect to the server at this time.	You might have entered an incorrect host.
Unable to submit the file import activity. Check log for details.	You most likely don't have the correct permissions. Open the Errors work sheet to view the error details.

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

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

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

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

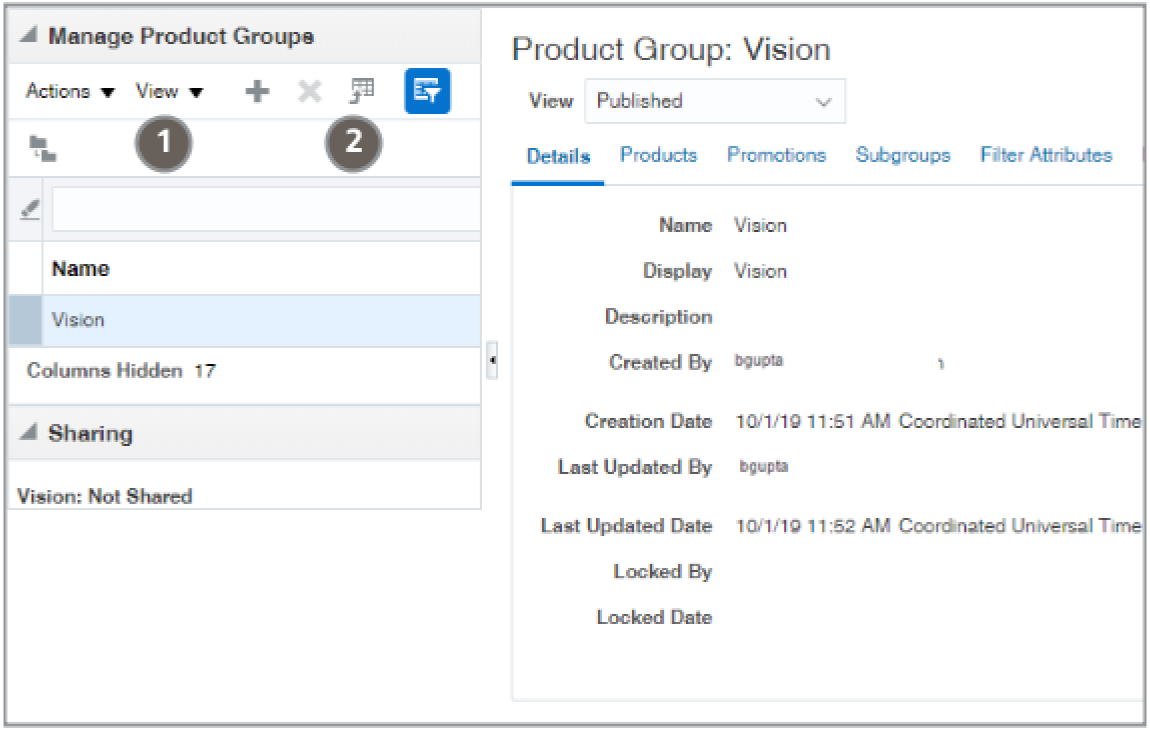
Obtain the Reference Number for the Root Product Group

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

1. In Setup and Maintenance, go to: **Sales offering Sales Catalog and Products functional area Manage Product Groups task**.

2. In the Manage Product Groups page, click **View** and select **Columns**, **Show All** to display all columns.

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



3. Click the **Export to Excel** icon and save the Excel file to your desktop. The reference number you need is in column D.
4. Click **Cancel**.

Import Product Group Hierarchy Information

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

1. Open the `ProductGroup_Import_Macro.xlsm` file with the product groups you just imported. You use the product group reference numbers to build the hierarchy.
2. Open ProductGroupRelationSetup_Import_Macro.xlsm.
3. Make sure macros are enabled in Excel.
4. In the ProductGroupRelationSetup_Import_Macro, enter the reference number for each product group and the reference number for its parent. For the product groups immediately under the root product group, you must enter the root product group reference number you got from the UI.
5. When you're done with your entries, click **Create Import Activity**.
6. On the Login page, enter the following:
   - Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/sales`.
   - Your user name
   - Your password

7. Here's what to do if you're prompted to correct errors in your entries:

    a. Click **OK**.

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

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

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

   The application displays one of these messages:

Message	Meaning
`The file import activity was submitted successfully.`	Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.
`Unable to connect to the server at this time.`	You may have entered an incorrect host.
`Unable to submit the file import activity. Check log for details.`	You most likely don't have the correct permissions. Open the Errors work sheet to view the error details.

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

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

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

Validate the Sales Catalog

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

1. Sign in as a sales manager or a salesperson.
2. Create an opportunity or lead and save your changes.
3. Add products to the opportunity or lead.
4. Verify that your product groups (and products if applicable) display in the catalog.

Setup Tasks to Complete if You Didn't Use the Setup Assistant

Sales Catalog High-Level Setup Steps

If you didn't use the Setup Assistant to get started creating your catalog, follow the steps here to create the catalog.

This table shows the high-level setup steps and where to find more information about the step:

> **Note:** If you're using the Setup Assistant to create your catalog, start with *Overview of Sales Catalog Setup*. When you use the Setup Assistant, many steps are done for you by the assistant.

Description	Where to Find More Information
Step 1 Ensure that your prerequisite structures are set up before starting to create the catalog.	*Prerequisite Setups for Sales Products*
Step 2 Create the root product group. The root catalog or root product group is the top of the product group hierarchy. All other product groups are nested underneath.	*Create the Root Product Group*
Step 3 Add additional product groups to create the catalog hierarchy of product groups and subgroups. Once your hierarchy is set, you can add the product groups manually in the product groups pages, or you can import them. Importing products lets you use quick import macros or Import Management to create the entire product group and product hierarchy all at once. **Note:** If you're not integrating with an order management application or doing quoting, you can simply use a product group hierarchy without products. There's no need to use individual products unless you need to for downstream applications.	• *Create the Product Group Hierarchy* • *Options for Importing Data Into Your Application*
Step 4	• If using the sales Products UI, see *Create Products*.

Description	Where to Find More Information
If you're going to use individual products in the catalog, add products to the application. You can create products using the sales Products UI or the product model available with Oracle Supply Chain Management Cloud. You can also import products and the product hierarchy all at once. Or, you can use Import Management to import products and the hierarchy.	• If using Oracle Supply Chain Management (SCM) Cloud product model see these guides: ◦ Oracle SCM Cloud Implementing Product Management ◦ Oracle SCM Cloud Using Product Master Data Management • *Options for Importing Data Into Your Application*
Step 5 If you're going to use individual products in the catalog, add products to the product group hierarchy.	*Add Products to the Catalog*
Step 6 Publish the product group hierarchy that makes up the sales catalog. Perform this step in the product groups pages in Setup and Maintenance. When 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 consuming applications.	• *Publish the Sales Catalog* • *Run the Refresh Denormalized Product Catalog Table*
Step 7 To enable a sales catalog for use in the applications, you associate it with a "usage" called the Base usage.	*Enable the Sales Catalog by Setting the Base Usage*
Step 8 If you make a new assignment of Base to a root product group, you must run the scheduled process, Refresh Denormalized Product Catalog Table for BI. If you don't run the process, your product group hierarchy might not appear in the consuming applications.	*Run the Refresh Denormalized Product Catalog Table*
Step 9 If using classic Sales (and not the Redwood version), set the profile option, Browse Sales Catalog in Opportunities Enabled, to Yes to enable Browse Sales Catalog button on the Products table.	*Enable Salespeople to Browse the Catalog*
Step 10 Salespeople browsing the sales catalog can sort products and product groups alphabetically after you set a profile option.	*Let Salespeople Sort the Sales Catalog Alphabetically*

Description	Where to Find More Information
Step 11 If you've set up the browse catalog feature (needed only for classic Sales only), configure search and browse options.	*Set Sales Catalog Search and Browse Options*
Step 12 After you've published and enabled your catalog and, optionally, set up browsing, validate your setups.	*Validate the Sales Catalog*
Step 13 You can implement eligibility rules that enable salespeople to check product eligibility in opportunities.	*Set Up Product Eligibility*
Step 14 You can configure whether the sales catalog displays only product groups and products within a user's sales territories, or if it displays all product groups and products defined in the catalog.	*Filter Sales Catalog Display by Territory*
Step 15 You can use the prebuilt Fusion Sales-Oracle Configure, Price, and Quote (Oracle CPQ) integration to let salespeople manage a variety of quote-related activities.	These guides: • *How do I get started with the Oracle Revenue Transformation Solution?* • *Integrating Fusion Sales with Oracle CPQ* guide

Prerequisite Setups for Sales Products

Before you set up and use sales products, ensure that your environment has completed the prerequisite setups discussed in this topic.

Create a Location

You must create a location for your organization so that you can select it when you create the item organization. However, if you have already set up locations as part of your initial setup with another cloud service, then you don't need to perform this step.

1. Sign in as a setup user and go to the following in Setup and Maintenance:
   - Offering: Sales
   - Functional Area: Sales Catalog and Products
   - Show: All Tasks
   - Task: Manage Locations
2. Click **Create**.

3. In the Location Information region **Name** field, enter any name. For example, `HQ`.
4. Enter any combination of letters or numbers without spaces in the **Code** field. For example, `HQ`.
5. You don't need to change the other values.
6. Click **Submit**.
   The application displays a warning informing you that the request will be submitted.
7. Click **Yes**.
8. Click **OK** to close the confirmation message.

Create Item Master and Ensure Setup of Location

Sales products functionality relies on the item master organization, the organization that holds the definitions of all products your company plans to sell. Therefore, before you can use products in your catalog, you must set up a location and then an item master organization.

For more information, see the related topics and these guides:

- Oracle Applications Cloud Understanding Enterprise Structures guide
- Oracle SCM Cloud Implementing Product Management guide
- Oracle SCM Cloud Using Product Master Data Management guide

1. Sign in as a setup user and go to the following in Setup and Maintenance:
   - Offering: Sales
   - Functional Area: Sales Catalog and Products
   - Task: Manage Item Organizations
2. On the Manage Item Organizations page, click **Create** (the plus icon).
3. Enter any name in the **Name** field, for example, `Vision Item Master`.
   You must select this name when setting the system profile option Sales Products Item Organization in a separate and related task. This name is visible only during setup.
4. In the **Organization** field, enter any combination of up to 18 uppercase letters and numbers, for example, `VISION`.
   You must enter this name in the separate and related setup task: Manage Spoke Systems.
5. In the **Name** field in the Location region, click the down arrow and select **Search** from the list.
   The Search and Select: Location Details window appears.
6. In the **Name** field, enter the name of the location you created.
7. Click **Search**.
8. Select the organization name and click **OK**.
9. On the Create Item Organization page, click **Next**.
10. On the Manage Item Organization Parameters page, make sure the organization name you entered (`Vision Item Master`) is selected in the **Item Master Organization** list. This selection establishes the organization as the item master.
11. In the **Starting Revision** field, enter a number. For example,`1`. Again, your entry doesn't matter.
12. Click **Save and Close**.
13. Click **Done**.

Ensure Setup of Units of Measure

Units of measure (UOMs) are standard definitions for product measurements; therefore, you must set up UOMs. If UOMs are already set up as part of your company's existing setups, then you can skip this step.

Setting up UOMs involves creating the larger UOM classes (or categories), as well as the UOMs themselves. For example:

- If you're selling consulting services where you charge by the hour and minute, then you set up Time as the UOM class and Hour and Minute as UOMs.
- If you're selling goods that are priced by the box and by the unit, you set up Quantity as the UOM class and Box and Each as the UOMs.
- If you're selling and pricing goods by the meter, then you set up Dimension as the UOM class and Meter as the UOM.

Note: Each class can have only one base UOM. Base UOMs should generally be the smallest UOM in the class.

Tip: When disabling UOMs, disable the conversions first, then the UOM. It the UOM you're disabling is a base unit, the class should be disabled also. After an item has been defined in the item master, then the primary UOM for that item can't be modified.

1. Sign in as a setup user and go to the following in Setup and Maintenance:
    - Offering: Sales
    - Functional Area: Sales Catalog and Products
    - Task: Manage Units of Measure

2. Create the class for the unit of measure:

    a. Click **Manage UOM Classes**.
    b. On the Manage UOM Classes page, set up each class:

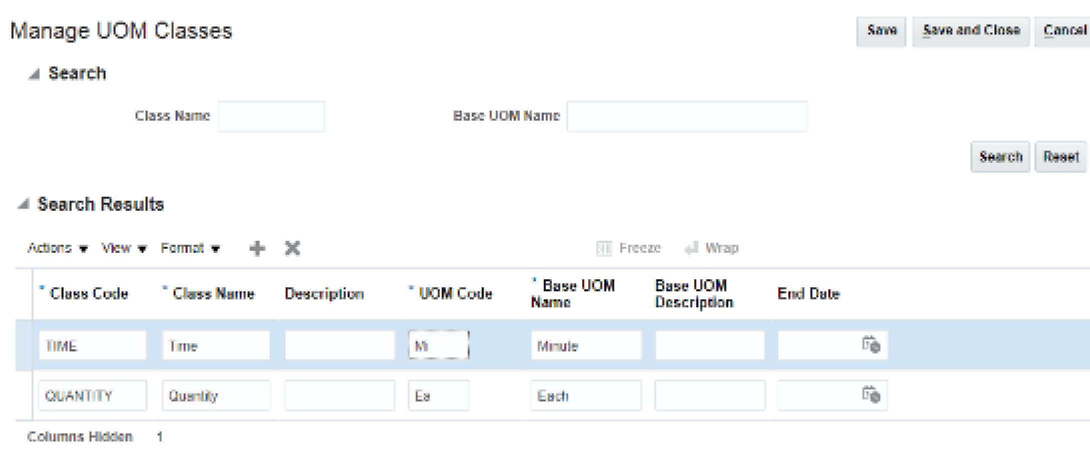
        i. Click **Add**, (the plus sign icon in Search Results).
        ii. Enter the class code (no spaces permitted), class name, and optional description.

            For example, for quantity, enter `QUANTITY` as the **Class Code**, `Quantity` as the **Class Name**.
        iii. Enter a code (three-character limit) and name for the smallest unit you're selling in the **UOM Code** and **Base UOM Name** fields.

            For example, for the class Quantity, enter `Ea` as the **UOM Code** and `Each` as the **Base UOM Name**.

            Salespeople use your entry in the name field for entering opportunity quantities.

            Here's a screen shot of the Manage UOM Classes page:



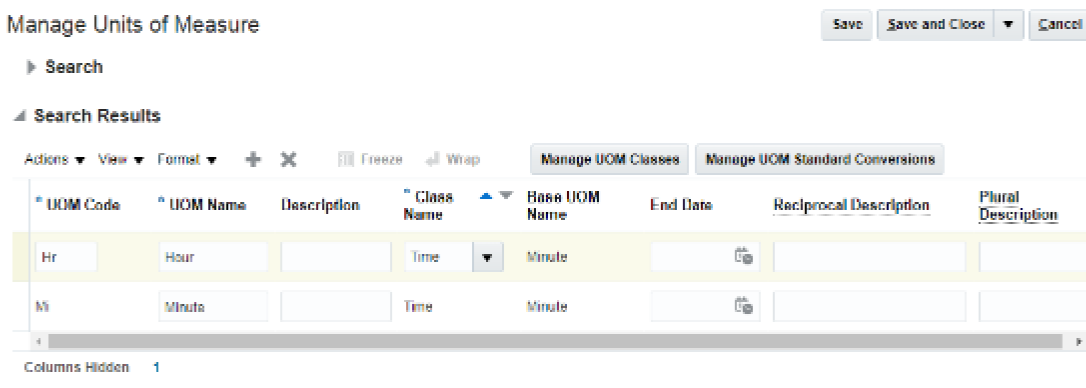
3. Click **Save and Close**.
4. You created the smallest unit of measure for each class. Now create any additional units of measure for each class:

    a. On the Manage Units of Measure page, click **Add**, (the plus sign icon) in Search Results.
    b. Enter the code (maximum of three characters) and the name of the unit of measure.

        For example, if your smallest unit of measure for the class Time was Minute, then create Hour as another unit of measure if your organization charges by the hour.
    c. Select a class from the **Class Name** list.

5. Click **Save**.

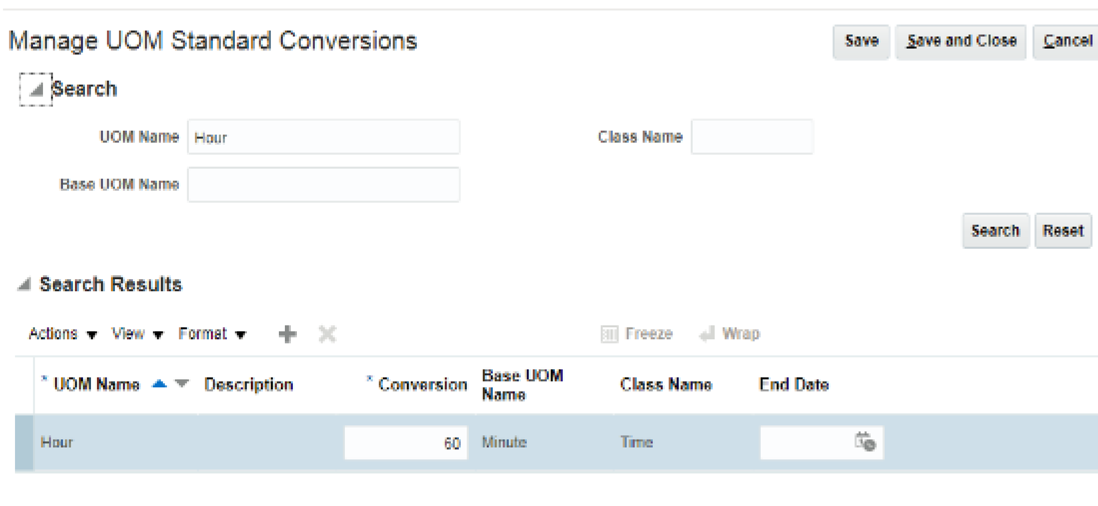
   Here's a screen shot of the Units of Measure page with Hour and Minute units of time measure:



6. Click Manage **UOM Standard Conversions**.
7. On the Manage UOM Standard Conversions page, enter the conversions for each of the additional units of measure you created:

   a. Enter the UOM name, for example, `Hour`, and click **Search**.
   b. Enter the conversion. For Hour, enter `60` to indicate there are 60 minutes in the hour.

      Here's a screen shot of the Manage UOM Standard Conversions page showing the conversion for the hour unit of measure.



8. After you enter all of the conversions, click **Save and Close**.

Specify the Item Master Organization for Sales Products

You must set the Sales Products Item Organization system profile option to the item master organization you just created.

1. Sign in as a setup user and go to the following in Setup and Maintenance::

   - Offering: Sales

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

2. In the **Profile Display Name** field, enter `Sales Products Item Organization`.
3. Click **Search**.
4. Click the name of the profile option in the search results.
5. In the **Profile Value** field, select the item master organization you created from the list.
6. Click **Save and Close**.

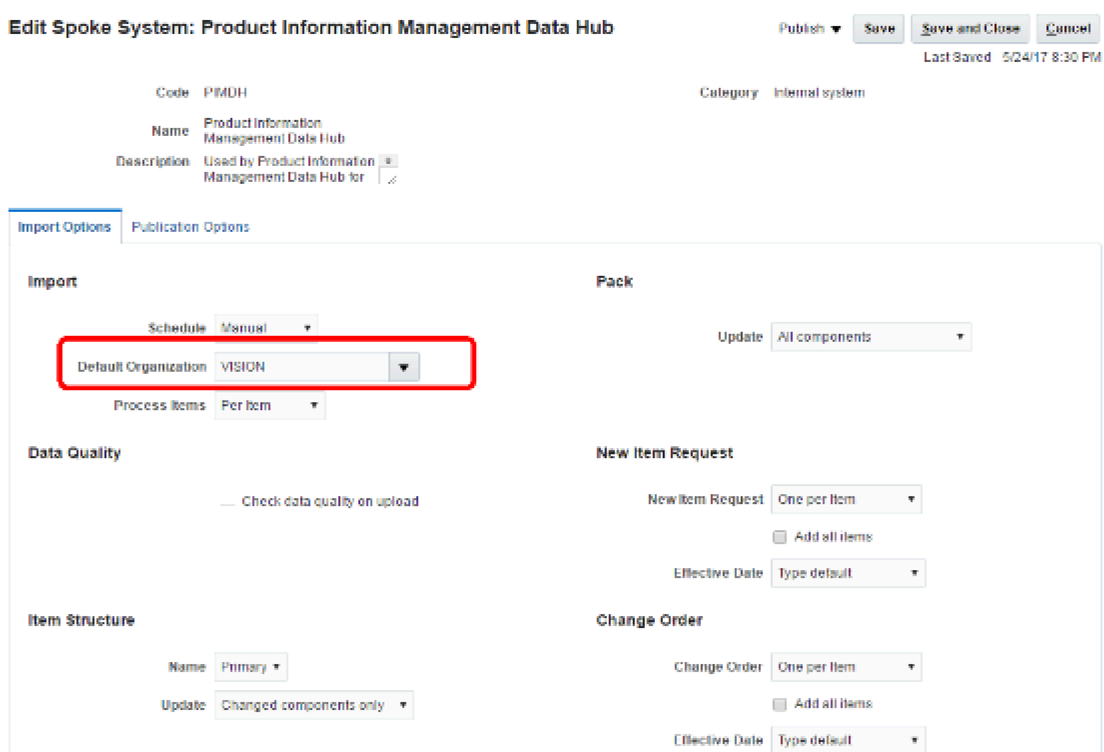
Identify the Item Master Organization as the Source of Import Data

You must specify the item organization as the default source of the import data using the Manage Spoke Systems task. Spoke systems (also called source systems) identify the source of import data.

1. Open the **Manage Spoke Systems** task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area. (You must use the side-panel search because the task isn't in the Sales offering.)

   The Manage Spoke Systems page appears. You can ignore any error message you receive regarding read permissions.
2. In the **Name** column in the Search Results region, click the **Product Information Management Data Hub** link.
3. On the Edit Spoke System: Product Information Management Data Hub page, Import Options tab, select the item master organization name you created earlier from the **Default Organization** list. For example, `VISION`.

   Here's a screen shot of the Edit Spoke System: Product Information Management Data Hub page highlighting the location of the Default Organization field:



4. Click **Save and Close**.
5. Click **Done**.

Related Topics

- Sales Products High-Level Setup Steps
- Item Master Organizations
- Item Organizations
- How Units of Measure, Unit of Measure Classes, and Base Units of Measure Relate to Each Other
- How to Assign Base Units of Measure to Unit of Measure Classes

Create the Root Product Group

The root product group is the top-level product group in your catalog. The display name you use appears in the UI for users.

> **Note:** If you're importing product groups, follow the *steps* in the *Implementing Sales* guide.

Here's how to create the root product group:

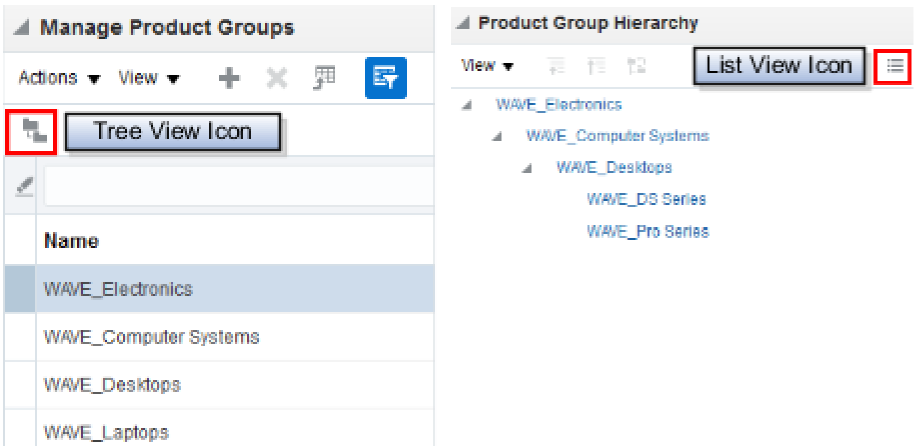
1. In Setup and Maintenance, go to:
   - Offering: Sales
   - Functional Area: Sales Catalog (or Sales Catalog and Products)
   - Task: Manage Product Groups
2. In the Manage Product Groups page, click the create icon (the add icon available in the toolbar in the left pane).
3. In the **Name** field, enter a unique name without spaces. This is the internal name of the group.
4. In the **Display** field, enter the product group display name. This is the name that displays in the UI to users.
5. Optionally, enter a description and start and end dates.
6. Select these check boxes:
   - **Active**: Your catalog must be active to be used in consuming applications.
   - **Root Catalog**: The root catalog is the top product group in the hierarchy. All other product groups created under it are considered subgroups. You can only add root catalogs to the Base usage in the Manage Product Group Usage page. You need to add your catalog to the Base usage so that it can be used in consuming applications.
   - **Locked**: A product group must be "locked" to be edited.
7. Deselect the **Allow Duplicate Children** check box. You must deselect this check box because the same product groups can't appear multiple times in the sales catalog hierarchy.
8. Leave the **Allow Selection** check box checked.
9. Click **Save and Close**.
10. Verify that the root product group appears in the Manage Product Groups pane.

Create the Product Group Hierarchy

If you're manually creating the product group hierarchy in the UI, create the remaining product groups under the root product:

1. Click the root product group in the side pane.

   Keep in mind that when you view product groups in the Manage Product Groups page, you have two view options: List view: When you first enter the Manage Product Groups page, you see the product groups as a list of folders. Click the tree view icon to enter tree view.Tree view: Tree view shows the product groups as nested parent-child groups. To return to list view, click the list view icon. In order to see the list view icon and the list of product groups, you may need to expand the Manage Product Groups pane.Here's what the list view and tree view icons look like on the Manage Product Groups page:

2. In the Manage Product Groups page, click the **Subgroups** tab in the main work area.

   The product group information for the selected group appears in the main work area.

   > **Tip:** A product group must be "locked" to be edited, so ensure that the parent of the product group you're creating is locked.

3. Click the **Create** icon.
4. In the Create Subgroup dialog box, enter the product group information.
   - In the **Name** field, enter a unique name without spaces.
   - In the **Display** field, enter the product group display name.
   - Enter a description and start and end dates if you want.
   - Select these check boxes:
     - **Active**: Only active product groups are available for use in the consuming applications.
     - **Root Catalog**: Don't select the **Root Catalog** check box. You can have only one root catalog.
   - Deselect the **Allow Duplicate Children** check box to make sure that product groups and products don't appear multiple times in the hierarchy.
5. Click **Save and Close**.
6. Verify that the product subgroup is visible in the Manage Product Groups pane. If the new subgroup doesn't appear, then click **View** and then **Refresh**.
7. Repeat the steps to create additional levels in your sales catalog hierarchy.

Add Products to the Catalog

Now that you have created products following the steps in the Products chapter of this guide, or, if you have imported them, your next step is to add them to the product groups that make up the sales catalog hierarchy.

Here's how to manually add products to the sales catalog product group hierarchy.

1. In Setup and Maintenance, go to the **Sales offering** > **Sales Catalog and Products task** > **Manage Product Groups task**.
2. In the Manage Product Groups page, in the product group hierarchy, select the product group that you want to add products to.
3. Lock the product group for editing by clicking the **Lock** button.
4. Click the **Products** tab for the product group you selected.
5. In the **View** filter, ensure that the Administration view is selected.
6. In the products table, select **Actions** > **Select and Add**.
7. In the Select and Add: Products screen, search for and select the product you're adding.
8. Click **Apply** and then **OK** in the select and add window.

   The application returns to the Manage Product Groups page with the product added to the product group.
9. Click the **Publish** button to publish the product group.
10. Finally, click **Yes** in the Confirm Publish dialog window and then dismiss the confirmation message. The application publishes the product group.
11. Save your changes.

To select the organization that provides the set of products available for marketing and sales activities, select an option in the QSC_SALES_PRODUCTS_INVENTORY_ORG_ID profile value.

For more information about how to create products manually in the sales UI, see the Products chapter in this guide. To understand how to import products and the product hierarchy, see the *product import topics*.

Of course, if you're integrating with Oracle Supply Chain Management (SCM) Cloud, you may be creating product in that application's Products screens.

Related Topics

- Overview of Sales Products
- What are the available data import options?

Enable Salespeople to Browse the Catalog

If you want salespeople be able to browse the catalog in opportunities and leads, rather than select products from a list, set the profile option, Browse Sales Catalog in Opportunities Enabled, to Y.

The application shows the Browse Sales Catalog button on the Products table in opportunities and leads after you do this:

1. In Setup and Maintenance, go to:
   - Offering: Sales
   - Functional Area: Opportunities

    - Task: Manage Opportunity Profile Options
2. Search for:
    - Profile Display Name: Browse Sales Catalog in Opportunities Enabled

      or
    - Profile Option Code: MOO_ENABLE_BROWSE_CATALOG
3. In the list that's returned, click on the profile option name link.
4. In the Profile Values region, set the Profile Value to `Y`.
5. Save your changes.

Publish the Sales Catalog

After building your catalog, you must publish it. While your catalog may have many product group nodes, you must at least publish the root group.

After you publish the at least the root group, you enable the catalog by associating the root group with the Base usage. Find these steps in the topic, Make Your Sales Catalog Available for Use, available in the related links section.

Here's how to publish the root group:

1. Lock the root product group and the remaining groups in your hierarchy that you want to make available to end users.
2. Select the root group and click the **Publish** button.

    > **CAUTION:** When you publish a node in the hierarchy, the application tries to also publish all of the locked product groups. So, if you have product groups in the application that you don't want published, be sure to unlock them so that they don't get published with the root and its subgroups.

3. Click **Yes** in the Confirm Publish dialog box.
4. Click **OK** on the confirmation message that's displayed.
5. Click **Save and Close**.

Related Topics

- Sales Catalog High-Level Setup Steps

Enable the Sales Catalog by Setting the Base Usage

Now that you've built your catalog, you enable it by associating it with a "usage" called the Base usage.

1. In Setup and Maintenance, go to:
    - Offering: Sales
    - Functional Area: Sales Catalog and Products
    - Task: Manage Product Group Usage
2. In the Manage Product Group Usage page, select the Base record. If a product group is already associated with the Base usage in the Details section in the portion of the screen, then you can remove the product group by selecting it and clicking the Delete icon.

3. In the Details section, click the **Select and Add** icon.
4. In the dialog box that appears, search for the root catalog that you just created.
5. Select the record and click **OK**
6. In the Manage Product Group Usage page, click **Save and Close**.

Note: Each time you make a new assignment of Base to a root product group, be sure to run the scheduled process, Refresh Denormalized Product Catalog Table for BI. If you don't run the process, your product group hierarchy may not appear in the applications. See the topic, *Run the Refresh Denormalized Product Catalog Table Process*, for more information.

Run the Refresh Denormalized Product Catalog Table 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 may not appear in the applications.

Run the Process

Here's how to run the Refresh Denormalized Product Catalog Table for BI 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, enter `%Refresh%`, and click **Search**.
5. Select the **Refresh Denormalized Product Catalog Table for BI** process in the results that are returned and click **Ok**.
6. Click **Ok** again, if needed.
7. In the Process Details window, click **Submit**.

Related Topics

- Sales Catalog High-Level Setup Steps
- Enable Salespeople to Browse the Catalog
- Validate the Sales Catalog
- Best Practices for Sales Catalog Setup

Validate the Sales Catalog

After you publish and enable your catalog, validate that the product groups are appearing in leads and opportunities:

1. Sign in as a sales manager or salesperson.
2. Navigate to **Sales** > **Leads** and create a lead.
3. In the Create Lead window, click the **Primary Product** search icon and verify that you can see the product groups in the search utility.

4. Next, navigate to **Opportunities** and create an opportunity.
5. Search for the opportunity you just created and edit it.
6. In the Products region, click **Add**.
7. For Type, select **Group**.
8. In the Product list, verify that your product groups display.
9. In the Products table, click the **Browse Sales Catalog** button. Ensure that you can browse the catalog. Note that this option is available only if the administrator has enabled it.

Related Topics

- Sales Catalog High-Level Setup Steps
- Enable Salespeople to Browse the Catalog
- Run the Refresh Denormalized Product Catalog Table Process
- Best Practices for Sales Catalog Setup

Additional Concepts and Procedures

Enable Sales Catalog Browsing in Opportunities (Classic Sales Only)

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

> **Note:** This functionality applies only to classic Sales. Browsing of the catalog happens automatically in Sales in the Redwood UX, so there's no setup needed.

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

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

Set the Browse Sales Catalog in Opportunities Profile Option

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

Filter Catalog Display by Territory

Territory Filtering of Products in the Catalog

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

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

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

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

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

Set Territory Filter Options

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

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

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

1.

Option	Description
Do not run	Territory filtering is off. The Filter by Territory check box does not display.
Enforce territory	Territory filtering is on, but is transparent to the user. The Filter by Territory check box does not display.

Option	Description
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 Sales Products and SCM Cloud Products Work Together

When you create or update product information in the Sales Products area, the product information is automatically updated in Oracle Product Information Management (also called PIM or the Product Model).

This table shows the mapping between Sales product attributes and Product Model item attributes:

Sales Product Attribute	Product Model Attribute
Inventory Item ID	Item
Organization ID	Organization
Number	Item (in the Items UI header region)
Name	Description (in the Items UI header region)
Description	Long Description (in the Items UI Overview tab)
Product Type	Sales Product Type (in the Items UI Specifications tab and Sales and Order Management side navigation region). See *Significance of the Sales Product Type Field*for more information.
Default UOM	Primary Unit of Measure (in the Items UI Overview tab)
Eligible to Sell	Customer Orders Enabled (in the Items UI Specifications tab and Sales and Order Management side navigation region)
Eligible for Service	Service Request (in the Items UI Specifications tab and Service side navigation region)
Attachments	Attachments tab (in the Items UI)
Image	Image (in the Items UI header region)

Significance of the Sales Product Type Field

The Sales Product Type field is an important attribute in relation to Sales Products. The value set in this field indicates whether a product can participate in specific Sales management processes by default, without customization.

For example, the sales product types, Subscription and Extended Warranty, are meant for products that follow Subscription Management (the Subscription-Sales management process), whereas One Time Service, Installation, Software Maintenance, and Preventive Maintenance are example Service products and are referred to in the Service Sales Management process.

> **Note:** In the create and edit product pages, if the Sales Product Type selected is one of the following, then the Eligible for Service checkbox is cleared and disabled: Extended Warranty, Included Warranty, Preventive Maintenance, Service Level Agreement, Software Maintenance.

Optionally, you can modify the list of product types that display in the sales UI. Sales products retrieve the list of values for Product Type from the lookup type, QSC_SALES_PRODUCT_TYPE. You can find the lookup type in the Setup and Maintenance task, Manage Standard Lookups.