

Oracle Fusion Cloud Sales Automation

**Using Sales in the Redwood User
Experience**



Oracle Fusion Cloud Sales Automation
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F77866-12

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Contents

Get Help	i
1 About This Guide	1
Audience and Scope	1
Related Guides	1
2 The Basics	3
Home Page	3
Quick Tips to Get Started	4
Landing Pages	6
Sales Dashboard	8
Notifications	9
Records	10
My List	32
Verify Phone Numbers and Email Addresses	33
3 Search and Lists	37
Search on the Landing Pages	37
Switch to a Different Saved Search	38
Search Using Keywords	38
Filter a List	40
Filter by Numbers and Dates	42
Group and Summarize Search Results	43
Navigate to the Next Record	45
How do I search in fields in the Details pages?	45
Export Search Results	49
Change Fields Display in the List	49
Search for Resources	50
Search FAQs	50
4 Saved Searches	53
Saved Searches	53

Manage Saved Searches	53
Save a Search	54
Hide a Saved Search	54
Set a Default Saved Search	55
Rename or Delete a Saved Search	55
5 Leads	57
Create Leads and Close Deals	57
Lead Types	58
Create a Lead	59
Accept a Lead to Work On	62
Accept or Qualify Multiple Leads at the Same Time	62
Add Products to a Lead	63
Update Lead Information	64
Predict Lead Conversion Using AI Scores	65
Qualify a Lead	65
Convert a Lead Into an Opportunity	65
Retire a Lead	66
Add an Attachment to a Lead	66
Delete a Lead	66
View Lead Details in Oracle Eloqua	67
6 Accounts and Contacts	69
Accounts	69
Contacts	76
Email Addresses and Phone Numbers	82
7 Rollups	91
What are rollups?	91
Search Using Hierarchy Rollups	96
Search for Contacts Using Rollups	97
Group Your Accounts and Contacts List by Rollup Values	98
8 Quotes and Quote Lines	99
Quotes	99
Quotes in the Opportunity Work Area	100

Quote Lines	104
9 Appointments and Tasks	107
Overview of Appointments and Tasks	107
Review and Edit Tasks and Appointments in the Activities Work Area	108
View a Task or an Appointment in One of the Associated Records	109
Set an Appointment or a Task Reminder	110
Sales Recommendations	111
Add and View Attachments for Tasks and Appointments	112
Remove a Completed Task from the Pending List	112
Appointments	113
Tasks	115
10 Email	121
Send an Email to a Contact	121
Send an Email About a Lead, an Opportunity, or an Account	121
Send or Log an Email Directly from Lists of Activities	122
Review Email Responses	122
Reply to Emails	123
Find and Review Emails	124
Log an Email You Sent or Received Outside the Application	124
Oracle Microsoft 365 Add-in	125
11 Calls	131
Make Yourself Available for a Call	131
Place an Outbound Call	131
Call a Contact Directly from the List of Activities	132
Receive an Inbound Call	132
Create a New Contact or Lead from an Unknown Caller	134
Log a Manual Call	135
Use Call Scripts	135
12 Performance	137
How can I improve the performance of my sales team?	137
About Key Performance Indicators (KPI)	139
Why can't I see the activity history for my custom KPI?	140

Contests	140
Goals	142

13 Opportunities **149**

What are opportunities?	149
Overview of Opportunity Record Details	149
Create an Opportunity	151
Add an Attachment to an Opportunity	153
Close an Opportunity	154
Use Group By and Custom Aggregations for Opportunities	155
View Team and Territories Associated with an Opportunity	156
Owner Forecasts	157
Opportunity Revenue Lines	158

14 Web Conference **169**

About Web Conferences	169
Create a Web Conference Appointment	170
Manage My Web Conference	170
Microsoft 365 Integration	174

Get Help

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

Get Help in the Applications

Some application pages have help icons  to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

Join Our Community

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

Learn About Accessibility

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

Share Your Feedback

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

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

Thanks for helping us improve our user assistance!

1 About This Guide

Audience and Scope

This guide provides an introduction to the new Oracle Digital Sales application. It explains the principles of using the new interface and provides instructions on basic tasks. The guide doesn't explain the underlying CX Sales functionality. It focuses on what's new in Digital Sales.

Related Guides

Oracle Digital Sales is built on a brand new application foundation and interface. You can use the existing Oracle CX Sales Using Sales guide to help you understand the underlying sales concepts, however.

Title	Description
<i>Oracle Fusion Cloud Applications: Using Common Features</i>	Describes user tasks and features that are common across Oracle Applications Cloud.
<i>Oracle Fusion Cloud Sales Automation: Using Sales</i>	Describes the user tasks and concepts for Oracle CX Sales.

2 The Basics

Home Page

The home page is the first place you land when you sign in to your application.

- After you sign in, make sure you're on the **Digital Sales** tab to use Digital Sales features. The Sales tab, if it's available to you, includes many of the same icons, but they open the CX Sales UI.
- Open the different business objects and work areas by clicking the navigation icons. Which navigation icons are available depends on your role and how your administrator has set up your application. Here's a sample list:
 - **Accounts**
 - **Contacts**
 - **Activities**
Tasks and appointments.
 - **Leads**
 - **Opportunities**
 - **Sales Dashboard**
Overview of upcoming tasks, appointments, the pipeline, and other items requiring your attention. A good place to start your day.
 - **My List**
List of accounts, contacts, leads, and opportunities that you recently accessed or that have an activity you're associated with. Items accessed more often get higher priority on the list.
 - **Sales Performance**
The work area for contests and goals.
- From the **Quick Actions** column, you can create new items. Which items you can create depends on your permissions. For example, only inside sales managers can create goals and contests.
- The **Navigator** (the hamburger menu) provides an alternative way of getting to the same Digital Sales objects and work areas as the navigation icons. The menu includes many selections that aren't relevant to Digital Sales, so you may as well stick to the icons.
- Except for the **Home** and **Notifications** buttons, the other icons at the top of the page aren't used for Digital Sales. They're intended for the CX Sales application on which Digital Sales is built and for other Oracle Fusion Cloud applications. Note that while you can view notifications by clicking **Notifications** (the bell icon) on the Home page, you must be in one of the Digital Sales pages to open the Digital Sales items you're being notified about.
- To sign out of the application, click your initials at the top right-hand side of the page and select **Sign Out** from the **Settings and Actions** menu.

Here's a screenshot of the Digital Sales tab on the home page showing some of the main features:



Home Page Anatomy

Callout	Description
1	Digital Sales tab with navigation to features available in the Digital Sales UI. You can access other sales features on the Sales tab.
2	Navigation icons.
3	Actions you can take directly from the home page.
4	Setting and Actions menu where you can sign out.
5	Navigator that you can use to get around instead of the navigation icons.
6	Home icon available on any page.
7	Notifications. You can view your notifications from the Home page, but you must be in a Digital Sales page to open related records.

Quick Tips to Get Started

This topic covers some basics to get started with Digital Sales.

Where to Start

- Click the Digital Sales tab at the top of the home page to view the different Digital Sales work areas available to you.
- The Sales Dashboard is a good place to start your day. It shows you what's important for you to work on. You can open key work items directly from the dashboard. But don't forget to click **Notifications** (the bell icon) to see incoming customer communications and reminders. Notifications aren't included in the Sales Dashboard.
- My List shows the accounts, contacts, leads, and opportunities that you worked on recently, and those that have associated activities. Items you use most often are shown first.

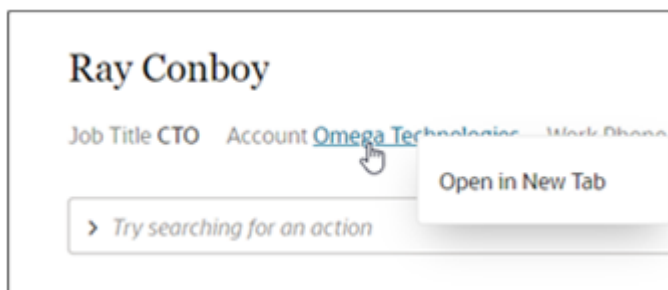
Search for Your Records

Search for your records on the landing pages by keyword. You can search for records by words in the name or by related information, such as the name of the account or city where the account is located. Your search is constrained by the saved search that you select. For the broadest search, always select the "All" saved search, such as **All Accounts**.

Navigation

- Scroll to see hidden panels on a record. To scroll you can swipe on a touch screen, use the mouse wheel, or use the **Tab** key.
- Bookmark important records so you can come back to them later.
- Use the back button on your browser to go back.
- Open multiple records on different tabs.
- Open related objects in a separate tab by right-clicking and selecting **Open in New Tab**.

While viewing a contact, right-click on the account name at the top of the page to open the account record in a separate tab. Or, while viewing an account, right-click on any of the contact names to display their records in a separate tab.



Work with Your Records

- When you're viewing records, you see what's important at a glance. You won't see complex pages with empty fields, buttons, and options. We've eliminated all the clutter.
- Use the **Action Bar** to take actions and to update information. Enter **update** and select what you want to update. Want to add a contact to the opportunity? Enter **Add** and select **Add Contact**. If you don't remember what actions are available, just start typing and see what the Action Bar suggests.
- The Activities page of each record displays past and future tasks and appointments, as well as notes, emails, calls, and important updates.

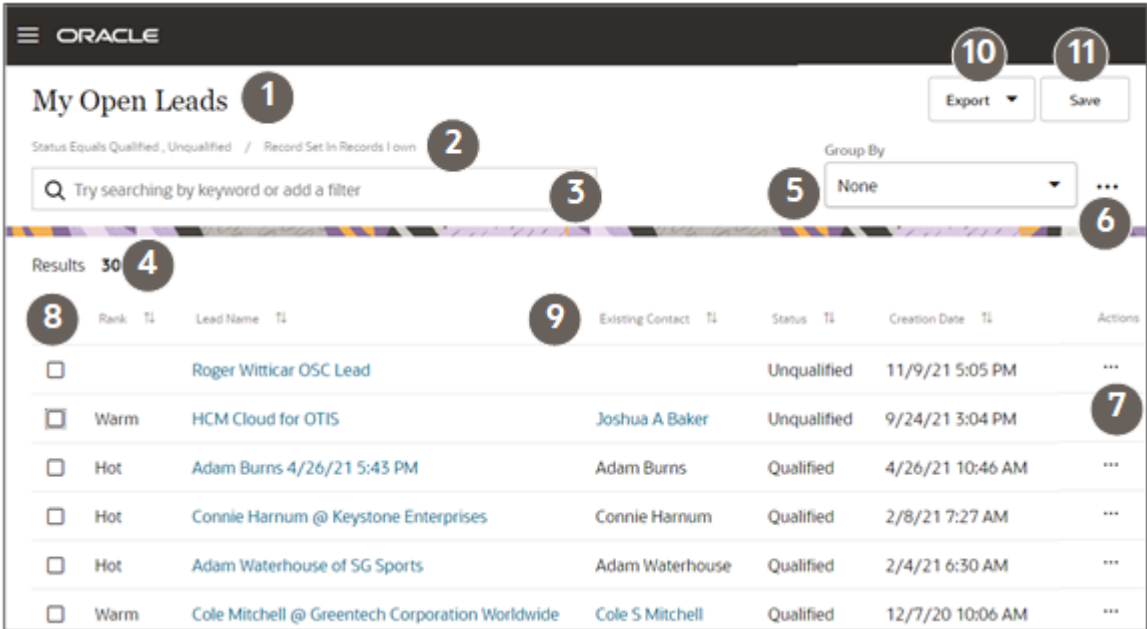
- Use the Action Bar to filter activities, and follow up on email conversations with customers. You can also use the Action Bar to search the text of notes, tasks, and emails in Activities using single keywords. The Action Bar filters and searches Activities, but not the other information displayed in the panels.

Landing Pages

When you click a sales object on the home page, the application automatically runs the default saved search for that object and displays the results on the landing page. The page shows either a list of the results or the first item on the list.

The List View

Most of the time, you see a list on the landing page. Here's the list view for leads. Other work areas are very similar.



Callout Number	Description	What You Can Do
1	The name of the saved search that's displaying the list that you're seeing on the page.	Display a different saved search from the search field.
2	List of filters applied in the saved search. The record set filter specifies the set of records that you can search. For example, My Open Leads displays all the unqualified leads you own. The list of filter criteria builds as you add filters and search terms. If there are no filters, you're seeing a list of all of the records that you have permission to view.	• Remove the filter criteria by clicking them. • Add filter criteria from the search field.

Callout Number	Description	What You Can Do
3	Search field	Click in the search field to: - Switch to another saved search. - Enter search terms. - Enter filters to narrow down the search. - Create records.
4	Results	You always know how many records match your search terms.
5	Group by	Select an attribute to group the information in your list. For example, selecting Status for a lead, breaks down your lead search results by status.
6	Actions on individual items in your search results.	Select an item in the list to display the actions. For example, on the contacts landing page, click Call to call the primary number for a contact. Click Send Email to send an email to the primary email address and so on.
6	List of Actions related to search result display.	Here you can choose which columns appear in search results, for example.
7	Actions on individual items in your list	Take actions on individual items in your search results. For leads, you can accept or qualify a lead, for example.
8	Select multiple items for action.	Take action on multiple items at the same time. Just select to see which actions area available. For example, selecting three unqualified leads, lets you qualify them all at the same time.
9	Columns and sort controls	- Rearrange columns by dragging them. - Sort results by one of the columns.
10	Export	You can export your search results to Microsoft Excel.
11	Save	Save your search criteria and filters as a new saved search.

First Item on the List

Administrators can configure the Contacts and Leads landing pages to display the overview of the first record on the list rather than the list itself. You can then navigate through the list using the **Next** button (callout 2 in the screenshot). You can click the list name (callout 1) to return to the list view.

↑ All Leads **1** **2** Next: Xandra Holcomb @Artemis International Solutions Corp

Yetta Valdez @ Numerical Technologies Inc [Lead Details](#)

Unqualified Primary Contact Account Name Rank Contact Email Contact Phone
Yetta B Valdez Numerical Technologies Inc Hot demouserb2b@oraclepdemos.com +1 (203) 799-4100

Digital Profile

> Try searching for an action

Contacts

- CB** Chris Balasubramaniam
Executive Director
+1 (818) 244-8080
chris.balasubramaniam@noreply.com
- YV** Yetta B Valdez
Executive Director
+1 (203) 799-4100
Yetta.Valdez@noreply.com **Primary**
- AT** Abigail Thomas
Senior Manager
+1 (415) 999-3715
abigail.thomas@oraclepdemos.com

[View All Contacts \(3\)](#)

Products

- Cloud Financials
\$ 285,000
- Enterprise Performance Management (EPM)
\$ 320,000
- Project Management
\$ 210,000

[View All Products \(3\)](#)

Team

- BF** Bob Flanders
Account manager
- JP** Josephine Pinto
Executive sponsor
- MC** Michel Clark
Support account manager

[View All Team \(3\)](#)

Sales Dashboard

Use the Sales Dashboard to review key details about your day. Details include pipeline, upcoming appointments, and overdue tasks.

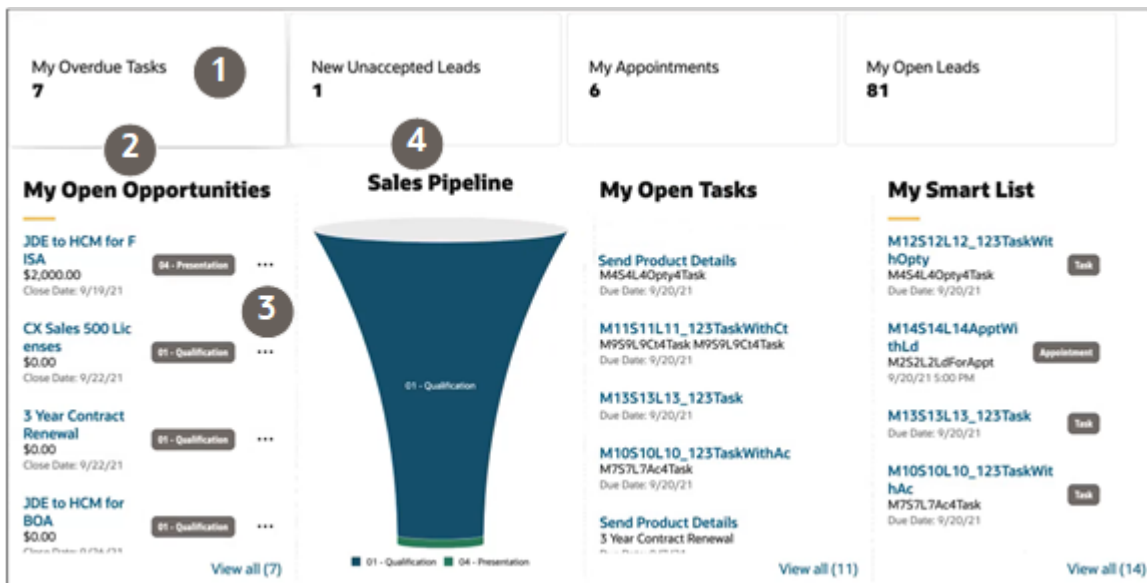
The Sales Dashboard includes two types of information:

- Lists of key items that you can take action on either directly from the dashboard or by drilling down. These lists are generated from saved searches.
- Graphic visualizations of your sales data generated either from the saved searches or by Oracle BI analytics.

Dashboard Panels and Tiles

- The tiles at the top of the page list the number of important work items. There's a tile showing your overdue tasks (callout 1 in the screenshot), scheduled appointments, open leads, and so on. Clicking on a tile displays the list.

- The bottom section of the page displays the most important items from various lists or displays graphics of your information:
 - My Open Opportunities (callout 2) lists opportunities that are closing soon. You can take an action on an item in the list by clicking **Actions** (the three dot icon, callout 3) or you can click **View all** to see the complete list of open opportunities.
 - Sales Pipeline (callout 4) displays a graphic of your pipeline by sales stage. Click the opportunity stages to get a list of opportunities at each stage.
 - My List shows the accounts, contacts, leads, and opportunities you last accessed, or that have an associated activity. Items accessed more often get higher priority.

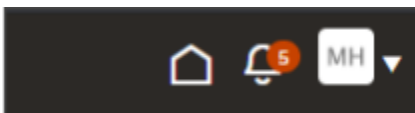


Note: Your application administrator determines what information appears in the dashboard for each role.

Notifications

The Notifications feature alerts you to incoming calls, upcoming task deadlines, meetings, and other important information that requires your attention. Start your day by clicking the bell icon and see what you need to do right away.

The notifications (bell) icon in the toolbar shows how many notifications you have. To check your notifications:



- Make sure you are in one of the Digital Sales work areas or pages. Viewing notifications within Digital Sales lets you navigate to the item you are being notified about. Click **Notifications** (the bell icon).
- In Notifications:
 - Search for notifications by keyword.
 - Click the notification to go to that issue. A missed call notification takes you to the activity stream for the contact that called.

- Click **Dismiss** to remove a notification from the list.

After you click the notification or click **Dismiss**, the notification is removed.

Records

Anatomy of a Record

Here's an overview of the different sections of an individual record. We're using an account as an example, but the pages for leads, contacts, and opportunities are similar.

Records Layout

Your records are divided into three sections:

- Summary (callout 1 in the screenshot)
- Action Bar (callout 2)
- Panels with key information (callout 3)

The screenshot shows the Oracle Fusion Cloud Sales Automation interface for a record titled "Pinnacle Technologies". The page is divided into three main sections, each highlighted with a callout number:

- Callout 1 (Summary):** Located at the top, it includes the account name "Pinnacle Technologies", a "Next: Pinnacle Technologies (Wilmington, US)" link, and an "Account Details" button. Below this is a header bar with fields for Industry (Healthcare), Address (300 Sand Hill Cir, MENLO PARK, CA 94025), Website (https://www.pinnacle1.com), Phone (+1 (777) 345-0898), and Owner (Matt Hooper).
- Callout 2 (Action Bar):** A search bar with the placeholder text "Try searching for an action".
- Callout 3 (Panels with key information):** A three-column layout containing:
 - Activities:** A list of activities, including "tsk_oppty" (Owner: Gabrielle Lee) and "Matt Hooper Updated Account" (6/29/21 11:01 PM).
 - Hierarchy:** A tree view showing the account structure: OBIA Enterprise > OBIA Technologies > OBIA Business Centre > OBIA Communications > Pinnacle Technologies. It also displays "Total Accounts: 72" and "Won Opportunities: \$11,937,077".
 - Contacts:** A list of contacts, including "Hester Martin Carey" (+1 (603) 556-4667) and "Abigail Harris" (+1 (545) 556-4445).

Summary

If you're drilling into a record from a list, the summary includes basic information.



Callout Number	What It Is	How You Use It
1	Name of the list	Click to navigate back to the list view.
2	Next	Click to go to the next record in the list.
3	Details button	Edit details about the record.
4	Record name and summary information	Review basic information about the record and who owns it. Click links to take actions, such as initiating a call.

The Action Bar at the Top of the Record Overview

Use the Action Bar to access and update information and to take action.

- Navigate to available information related to the record. Just enter **show**, and select what you want to see.
- Update individual account fields and add information. Enter **update** or **add** to see what you can do.
- Create related information. For an account, you can create contacts, opportunities, and leads. Enter **create** to see what you can create.
- Email, call, assign ownership, and take other actions. The actions available depend on your permissions.
- Enter **filter** and select what information you want to see.
- Search activities by keyword. For example, enter **Tanaka** and select **Filter Tanaka**, to find all the appointments, tasks, notes, and communications where Tanaka is mentioned.



Panels with Key Information

Panels display up to five of the most recently updated items related to the record, including the most recent and pending activities.

The panels you see depend on the type of record. Not all panels are visible, and not all information has its own panel. For example, account assets and news have their own separate panels, but attachments don't. To see all of the panels on a record:

- Swipe on a touch screen.
- Use the wheel of your mouse.

- Use the Tab key.

Alternatively, enter **show** in the Action Bar to see a list of all information you can view.

The screenshot displays the Oracle Fusion Cloud Sales Automation interface with three main panels. Callout 1 points to the Activities panel, which shows pending and recent activities. Callout 2 points to the 'View All Activities' link at the bottom of the Activities panel. Callout 3 points to the Hierarchy panel, which shows account hierarchies and rollup summaries. Callout 4 points to the 'View Account Hierarchy' link at the bottom of the Hierarchy panel. Callout 5 points to the Contacts panel, which shows a list of contacts. Callout 6 points to the 'View All Contacts (18)' link at the bottom of the Contacts panel.

Callout Number	What It Is	How You Use It
1	Activities panel	The activities panel displays both pending and the most recent activities. It displays up to five future and past activities. To see email threads and other details, click View All Activities .
2	View All Activities link	Click to display and edit activities. On the Activities page, you can view the full text of notes, reply to emails, reassign tasks, and so on.
3	Account Hierarchy panel	If your organization uses account hierarchies, you can view any account in the hierarchy by clicking a link. The panel can also include rollup summaries, such as the total revenue for all of the accounts in the hierarchy.
4	View Account Hierarchy link	Click to view details of the whole hierarchy.
5	Contacts panel	The panel lists up to five contacts that have been updated recently. You can email or call a contact by clicking a phone number or link. Click the contact name to drill down to details on that contact.
6	View All Contacts link with the total number of contacts	Click the link to display all contacts.

View All Activities

Click **View All Activities** on the Activities panel to view pending and recent activities. Here you update tasks, edit notes, and view and reply to email threads. Use the Action Bar (callout 1) to filter activities. Enter **Filter** and select the type of

activity you want to view. To search the text for keywords, select Filter <your keyword>. The filters display below (callout 2). You can return to the record overview by clicking **Go to Overview** or you can use the browser back button.

Pinnacle Technologies: Activities [Account Details](#)

Industry Healthcare

> Try searching for an action **1**

[Go to Overview](#) **3**

Email Communication **2**

June 2021

✉ **follow up email (1)** 6/24/21 11:53 PM

Matt Hooper
To: JamesD@Noreply.com 6/24/21 11:53 PM ⋮

Hello,
With reference to my introduction email, I'm writing to follow up.

⏪ Reply All

✉ **Re: Re Intro Email (3)** 6/24/21 9:31 PM

View All Contacts and Other View All Pages

The pages you reach by clicking the View All links, let you see all of the information and act on it. The Contacts page, for example, lets you send emails, make calls, and sort information by column. You can view all of the contacts for an account and sort the contacts by name.

Pinnacle Technologies: Contacts

Account Details

Industry Healthcare

> Try searching for an action

Go to Overview

1 Name ↑	Job Title ↑↓	Phone Number	Primary Email	Primary Contact	Actions
Abigail Harris		+1 (343) 332	2 ndmail-test-discard@ori	No	3 ...
Blake PHILLIF	Executive	206282576	sendmail-test-discard@ori	No	...
Cole Mitchell	Executive	206145704	sendmail-test-discard@ori	No	...
Cole Moss			sendmail-test-discard@ori	No	...

Callout Number	What You Can Do
1	Sort by column, such as Name.
2	Send emails and call by clicking.
3	Take actions.

You can also filter and search through the information on the Contacts page and on any other page with the Action Bar. Which attributes you can filter and search on depends on the information type. Just enter Filter in the Action Bar to see available fields and enter your search criteria.

For example, on the All Contacts Page, you can filter on Name, Primary Email, Comments and Contact Job Title.

When you select a filter, you can enter a search term. For example, you can search for all the contacts with names that contain the key word Nelson, as shown in the screenshot.

↑ My Accounts

Pinnacle Technologies: Contacts

Industry

Retail

Address

600 4th Ave Rm 107,SEATTLE, WA 98104-1850

Phone

+1 (465) 476-8

Owner

Gabrielle Lee

Name

×

>

☒ Contains

☐ Equals

☐ Starts With

☐ Ends With

Value

Nelson

Cancel

Apply

Primary Contact

discard@oracle.com

No

Joseph EVANS

sendmail-test-discard@oracle.com

No

Blake PHILLIPS

sendmail-test-discard@oracle.com

No

Details Pages

You can edit some, but not all, details about a record by clicking the Details button at the top of the page. You can edit only information that's stored with the record this way, not any of the information related to it. For example, you can add a contact, but you can't edit the contact information on the page.

Pinnacle Technologies

CancelSave

Account Properties

Organization Name

Pinnacle Technologies

Type

Customer

Parent Company

OBIA AtanTour (STAMBUL, TR)

X

Industry

Retail

Organization Type Code

Both: KAD

Website

Primary Contact

Owner

Gabrielle Lee

1

Phone

Ext.

Country

United States

Action Bar at the Top of the Record Overview

The Action Bar is a search box at the top of every record overview. It is key to working in Digital Sales.

Tips for Using the Action Bar

Here are ways that you can take actions on a record.

Action	How to get the result
To get to your most frequently used items.	Put your cursor in the Action Bar and choose from the list of suggested actions.
To update information	Start typing an action or the name of a field that you want to update and select what you want to do from the list of suggestions. For example, entering add for an account displays a list of things you can add to the account such as a contact, or a team member.
Get suggestions for actions that you can take.	For suggestions, the Action Bar looks for key verbs and names of objects and fields. Entering update gets you a list of things you can update. Entering address gets you Add Address and Update Address because both actions relate to addresses. You don't have to remember all of the verbs, many times a synonym will do. The Action Bar understands if you enter "edit" instead of "update". The Action Bar displays different suggestions for different sales objects. For example, "Qualify" is an action you can take on a lead, but not on an account.

Action	How to get the result
To follow up with a contact.	Go to that account and enter the action call or email and press Return . This starts the call or opens the email compose window. If you take these actions from an account or an opportunity with multiple contacts, the action is directed to the primary contact.
To display activities of a particular type.	To display only a specific type of information in Activities, enter filter and select what you want to display.
To search by keyword through the text of emails, notes, and tasks in Activities.	Enter a keyword for something that you want to find in Activities and press Return. For example, entering service and pressing Return, displays all tasks, appointments, notes, emails, and call logs that include the word "service". You can enter multiple keywords to narrow down your search. Email threads display only the first line of each email, so the search works only on the first line of emails. You can only search on words that aren't one of the keywords, so you can't search on the word "update" for example.

Apply Filters

Here are some of filters that you can enter in the Action Bar to narrow down the list of activities in a record.

Filter	What It Displays
Appointments	All scheduled and past appointments.
Tasks	All scheduled and past tasks.
Notes	All notes.
Field Changes	All field updates.
All Communication	All emails and phone call notes.
Email Communication	All email threads.
Phone Communication	All call logs.

Get a List of Suggested Actions

The list of suggestions is different for every object, but here's some samples of what you get when you enter key terms for accounts.

- Enter **show** to display all the information you can review on an account.

Suggestions	Description
show Activities	Takes you to the page where you can review and update activities, take notes, update tasks, reply to emails, and so on.

Suggestions	Description
show Addresses	Displays all of the addresses for the account. Here you can specify address type and designate any address as the primary address.
show Attachments	Add attachments and access existing ones.
show Email Addresses	Displays all of the email addresses. You can classify the purpose of each email and designate one as primary for the account. From here, you can edit the email addresses to specify if they're OK to use or not.
show Leads	Display a list of all of the leads related to the account that you have permission to access.
show Opportunities	Display a list of all opportunities related to the account that you have permission to access.
show Phone Numbers	Displays all the phone numbers for the account. You can classify the purpose of each phone number and designate one as primary for the account. From here, you can edit the phone numbers to specify if they're OK to use or not.
show Service Requests	Display a list of all service requests you have permission to view.
show Team Members	View and edit sales team members.

- Entering **add** gets you these suggestions.

Suggestions	Description
Add Address	Add an address.
Add Contact	Add a contact to the account.
Add Team Member	Add another salesperson to the account team.
Update Address	Update the primary account address.
Filter add	Searches Activities for all instances of the word "add".

- Entering **update** provides you with a list of individual fields you can update.

Suggestions	Description
update Address	Update the primary account address. You can add only one address for an account at this time.
update Industry	Update the primary industry classification for the account.
update Number of Employees	Update the number of employees.
update Organization Name	Update the account name.
update Owner	Enter the salesperson who owns this account.
update Parent Company	Enter the parent account for this account in the account hierarchy.
update Phone	Update the primary phone for the account.
update Primary Contact	Update the primary phone number.
update Type	Specify if the account is a customer or a prospect.
update website	Enter the account web address.
Filter update	Search the account activities for the word "update".

Tip: Dislike long lists? Just enter the field name without entering "update" first. Or you can update all of these fields in one place on the Account Details page (**Account Details > Edit**).

- Enter **filter** to zero in on the information that you want to review in Activities.

Suggestions	What It Displays
filter Appointments	All scheduled and past appointments.
filter Tasks	All scheduled and past tasks.
filter Notes	All notes.

Suggestions	What It Displays
filter Field Changes	All field updates.
filter All Communication	All emails and phone call notes.
filter Email Communication	All email threads.
filter Phone Communication	All call logs.

- Enter **create** to display what related objects you can create.

Suggestions	Description
create Appointments	Creates an appointment.
create Asset	Creates an asset for the account.
create Contact	Creates a contact.
create Note	Creates a note about the account.
create Opportunity	Creates an opportunity for the account.
create Service Request	Creates a service request.
create Task	Creates a task for the account.

- Entering **opportunity** lists two actions.

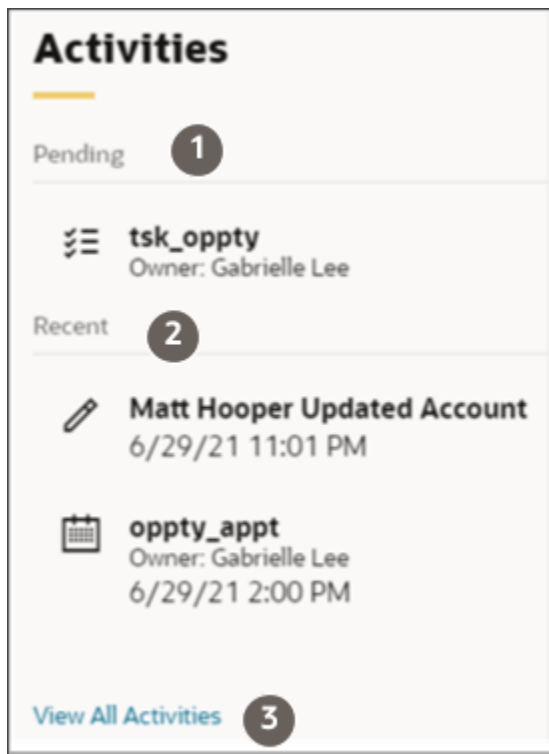
Suggestions	Description
Create Opportunity	Creates an opportunity for the account.
Filter opportunity	Search the account activities for the word "update".

Activities

Accounts, opportunities, contacts, and leads display related activities in each record. From the Activities panel and page, you can review email exchanges, notes, call logs, past and future tasks and appointments, as well as recent updates to that record. The activity history for each record is sometimes called its Activity Stream.

Activities Panel

The Activities panel displays a read-only version of the most urgent pending tasks (callout 1 in the screenshot) and the most recent updates or communications (callout 2). To view and update these and other activities, go to the Activities page by clicking **View All Activities** (callout 3).



Activities Page

To view and edit all your activities:

- In the Activities panel click **View All Activities**.
- In the Action Bar enter **show** and select **Show Activities**.

To see specific activity types enter **filter** in the **Action Bar** and select a type. Use keywords to search through the text of notes, tasks, appointments, and the first lines of emails.

The Activities page shows all the pending appointments and tasks. Pending tasks include both tasks with future due dates and incomplete or overdue tasks. Click the heading to collapse the Pending section.

Past activities, email threads, and updates are listed by date.

Activities Page

Callout Number	Description
1	Action Bar to filter and search.
2	Pending to-do tasks and appointments. The Pending section is closed by default.
3	Dates on past activities, updates, and emails.
4	Actions on tasks, appointments, and emails. For example, you can call a contact on a task by clicking Call. If there's only one contact associated to the task, the call dials directly. If multiple contacts are associated, you can choose which one to call. For emails, clicking Send Email opens an email compose window addressed to all the contacts associated with the record in the To field. Resources are copied (entered in the CC field). You can also log an email that was sent outside the application by selecting Log an Email.

PRM Discovery Inc.: Activities

Account Score 18 Industry Education & Research Address 6 Owens Drive, MINNEAPOLIS, MN 55404 Website <http://www.prmdiscovery.com>

1 > Try Add Address

Go to Overview

2 Pending

- Follow up** 6/11/22
Owner: Matt Hooper
- Lunch meeting** 6/8/22 12:00 PM 6/8/22 1:00 PM
Owner: Matt Hooper
- Prepare Demo** 6/7/22
Owner: Matt Hooper
- inquire about budget** Overdue 5/14/22 4
Owner: Matt Hooper

3 Today June 3, 2022

4 Our next meeting (1) 5:41 PM

Matt Hooper 5:33 PM
To: sendmail-test-discard@oracle.com
Very much enjoyed meeting you, Daniel. Can you please let me know when you're available for a follow up meeting?
Cordially, Matt

5 << Reply All

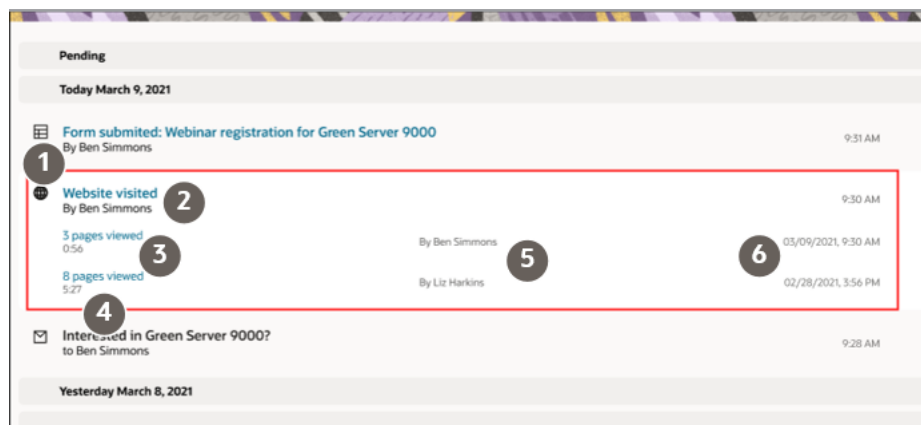
April 15, 2022

Account Updated 2:56 PM
By Matt Hooper
Owner Updated to Matt Hooper

Eloqua Web Activities

If you are using Oracle Eloqua, you can also view a full list of Eloqua web activities including:

- Form submits
- Web visits
- Email sends, opens, and clicks



Callout	Description
1	Indicates the web activity type.
2	Summary of the general subject.
3	Number of pages viewed and link to the first page viewed during the session.
4	Duration of the session.
5	Contact who visited the website.
6	Date and time when visit started.

How Activities in Individual Records Are Tracked and Displayed

How activities are tracked in each record resembles news feeds in social media. For each account, contact, lead, and opportunity, you can view the past history of activities and communications, including the text of emails. You can even reply or forward emails directly from an email thread. You can also view planned future activities. And you can review key record updates and know who made them and when.

Activities (also sometimes referred to as the Activity Stream) provide a chronology of the following:

- Communications, including call and web conference logs
- Email threads
- Notes
- Key record updates
- Web activities from Oracle Eloqua

You can view activities for a given record in the Activities panel on the overview page and on the Activities page.

Activities Panel

Callout	Description
1	Use the Action Bar to search and filter activities and update the record itself.

Callout	Description
2	The Activities panel on the record overview displays just one pending activity, the one that's due at the earliest time in the future. The Recent section displays a maximum of 5 historical items. These are read-only.
3	Click the View All Activities link to view details and edit these and other items.

Redline Hosting

Account Score 390 Industry High Technology Account Scoring Tier 1 Website <http://www.RedlineHosting.com>

> Try Create Opportunity **1**

Activities

2

Pending

- Send Followup Email...**
1/20/22 Overdue

Recent

- Discuss Approval Process**
Owner: Jane Solis
12/1/22
- Discuss Opportunity with...**
Owner: Jane Solis
11/30/22
- Meet with the sales team to...**
Owner: Jane Solis
10/19/22 12:00 PM

[View All Activities](#) **3**

Hierarchy

[Redline Technologies, Inc.](#) > Redline Hosting

Total Accounts
5

Parent Account
Redline Technologies, Inc.
1061 S Sun Dr, Suite 200, LAKE MARY, FL 32746
Child Accounts: 4

[View Account Hierarchy](#)

Activities Page

Callout	Description
1	Action Bar you can use to search and filter activities and update the record itself.
2	Pending activities list both pending and overdue tasks and future appointments. This section lists up to 20 items at a time, and is closed by default.

Callout	Description
3	The history section displays five of the most recent items organized by date. You can expand collapsed items such as email chains (not shown here). And you can scroll to see more items, five at a time. Instead of scrolling, you can filter and search for items using the Action Bar.

Redline Hosting: Activities

Account Score 390 Industry High Technology Account Scoring Tier 1 Phone +1

> Try Create Opportunity **1**

Go to Overview

Pending (5) **2**

December 1, 2022

⌵ Discuss Approval Process
Owner: Jane Solis

November 30, 2022 **3**

⌵ Discuss Opportunity with Manager
Owner: Jane Solis

October 19, 2022

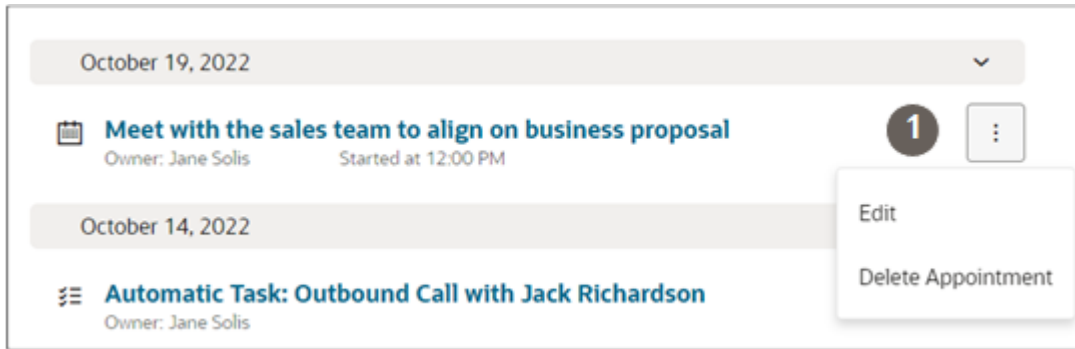
📅 Meet with the sales team to align on business proposal
Owner: Jane Solis Started at 12:00 PM

October 14, 2022

⌵ Automatic Task: Outbound Call with Jack Richardson
Owner: Jane Solis

Editing Activities

Callout	Description
1	Salespeople with the right permissions can edit and delete tasks, notes, and appointments from the Actions menu.



Pending Activities

- Pending activities can be both pending and overdue tasks as well as future appointments (appointments where the start time is later than the current time).
- The Activities panel on the record overview displays just one pending activity, the one that's due at the earliest time in the future.
- The Activities page displays up to a maximum of 20 most urgent pending activities in a Pending section that's collapsed by default.
- When a salesperson completes an item in the Pending section, the item is automatically moved to the history section and additional items are displayed, if any.
- Appointments and tasks that are due in the immediate future display at the top of the section. Those most immediate at the top.
- Overdue activities are displayed at the bottom of the section.

History

- The history section includes records of completed tasks, appointments, and communications, including call logs, email chains, and web conferences. Also included are notes, web activities from marketing, and key record updates.
- Salespeople with the appropriate permissions, can edit the call logs, activities, and notes.
- They can reply to emails (both Reply and Reply to All).
- The Activities panel on the record displays a maximum of 5 items.
- The Activities page displays 5 items at a time, the most recent first. You can scroll as far back as you want. Records are displayed for the past 3 years.
- Your administrator can configure which items and key updates are displayed in history.

Recommendations

The top of both the Activities panel and page can also display recommended actions generated from any of the following 2 sources:

- Analysis of the text in notes and call logs
Recommended actions can come from text analysis of text entered in call logs and notes. For example, salespeople can be prompted to create a follow-up appointment from notes someone took on a call
- AI-Generated Recommended Actions for Opportunities

AI can help you identify best opportunities to pursue and recommend different actions to take by assessing current and past deals.

Related Topics

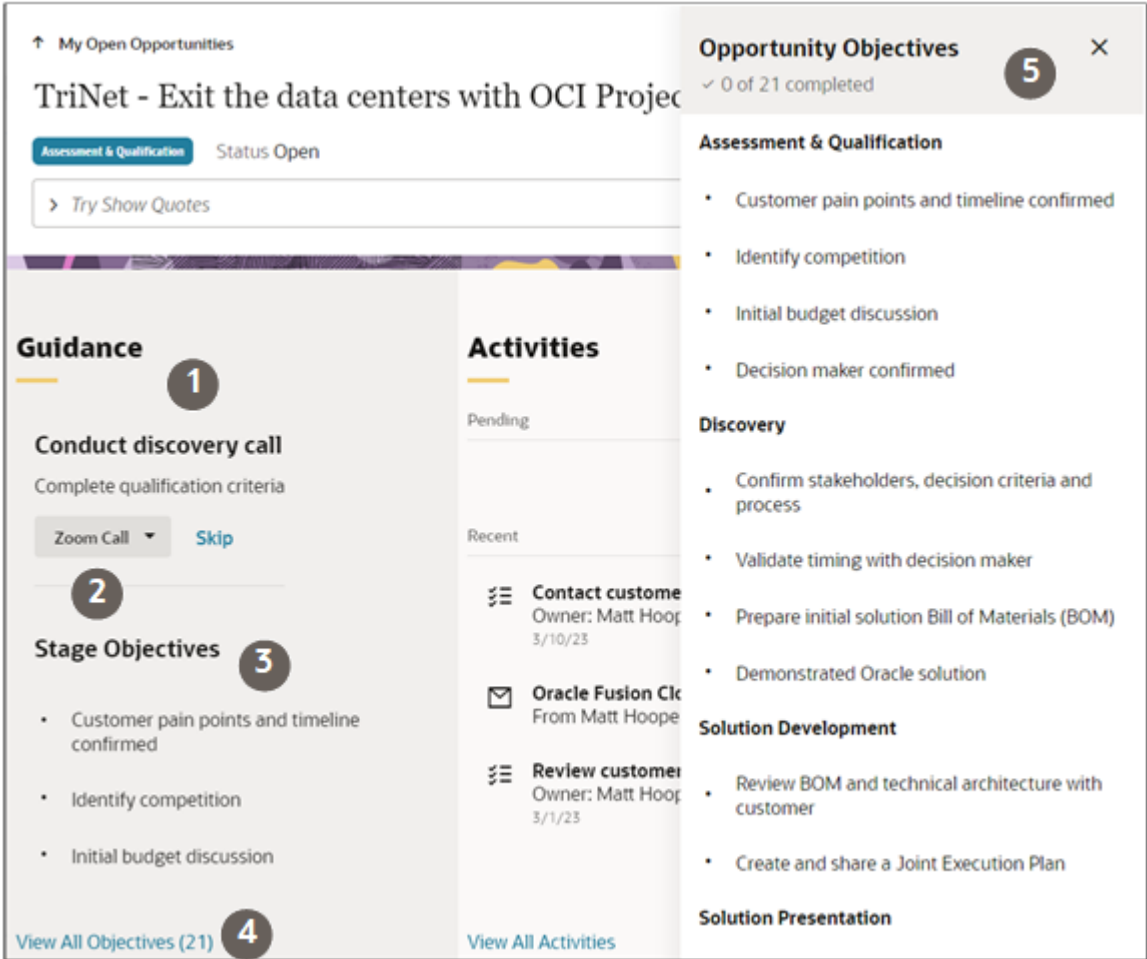
- [Action Bar at the Top of the Record Overview](#)

Best Practice Guidance from Orchestrations

If your administrator has create best practices for handling the lead or the opportunity you're working on using the Orchestration feature, then you'll see an additional Guidance panel in the record overview. The panel displays any recommended steps as you work. The recommendations automatically create either a task for you to accomplish or an appointment for you to schedule. You can also view the goals you're to accomplish using these tasks. Aside from the recommendations, the orchestration can also take automated actions behind the scenes as you work. For example, if you fail to reach someone by phone, the application can send a mail-merged follow-up email and remind you to call again in a few days.

Here's a screenshot of an opportunity overview showing the key features of the Guidance panel.

Callout Number	Description
1	The Guidance panel displays the current recommended step.
2	Clicking the action button initiates the action, such as opening a window, starting a Zoom call, or displaying information for you to act on. Clicking the Send Email button opens a compose window where you can create your email, for example. If the administrator has included a suggested template, the template is applied automatically. The action button includes the option to mark the step as already complete. You can also click Skip to move on to the next step. In this case, the step is marked as not complete. For steps that don't use smart actions, salespeople can either click Completed or Skip. Both options move the orchestration to the next success step. Clicking Completed closes the task and also marks any objective linked to the step as complete.
3	The Stage Objectives lists the objectives for the opportunity stage.
4	Clicking the View All Objectives link opens a panel that lists the objectives for the whole orchestration.
5	The list of objectives that you can display by clicking the link. Skipped or incomplete objectives are marked by an X. You can open up incomplete objectives and mark the required tasks as completed at any time.



Search and Filter Activities in a Record

You can search and filter the activities in a record using the Action Bar.

You can use keywords to search all activities including notes, tasks, and appointments as well as the text of all communications, including emails, call notes, and web session notes. You can search on any keyword except for words that denote actions in the application, such as email and call, for example.

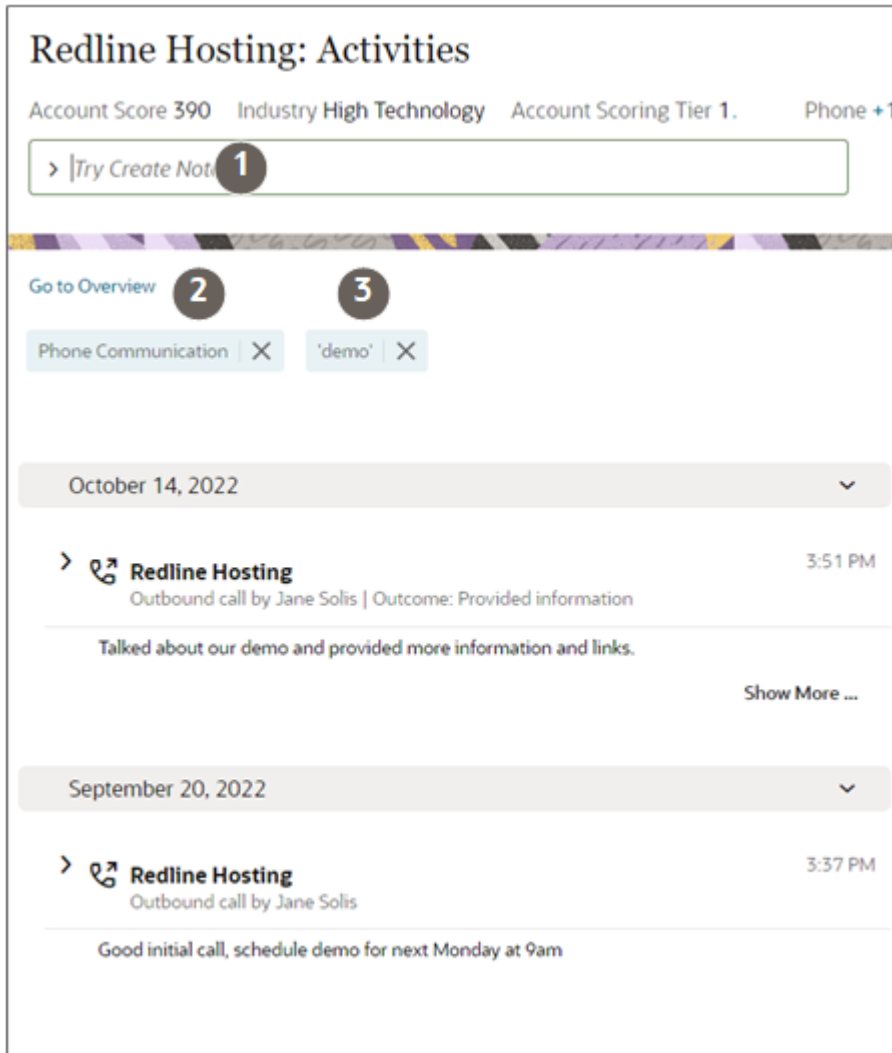
To filter, just enter the word **filter** in the Action Bar, and then select the filter. For example, you can select **Filter Phone Communications** to view all call logs for calls. You can use keywords in combination with filters.

This screenshot shows the result of an activities keyword search with a filter applied. Both keywords and filters you used in your search appear under the Action Bar.

Filter and Keyword Search Results Example

Callout	Description
1	Action Bar

Callout	Description
2	Filters you selected, such as the Phone Communications filter in this screenshot, appear under the Action Bar.
3	Keywords you entered appear in single parentheses.



Filter and Search in Lists of Contacts and Other Objects in a Record

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 | X >

☒ Contains

☐ Equals

☐ Starts With

☐ Ends With

Value

Nelson

Cancel

Apply

Primary Contact		
discard@oracle.com	No	
Joseph EVANS	sendmail-test-discard@oracle.com	No
Blake PHILLIPS	sendmail-test-discard@oracle.com	No

Update Multiple Records at the Same Time in List Pages

On a list page, you can update multiple fields in multiple records at the same time. Just select the records and enter the new values. What you can update depends on the records you selected.

For example, you can change the account type and owner for multiple accounts at the same time. Here's how:

1. Select the records in the list and click **Update**.
2. In the Mass Update drawer, select and provide a value for the fields you want to update.

Note: A selected field defaults to null if you don't provide a value.

3. Click **Submit**.

Mark a Record as Favorite

You can mark your favorite records so that you can find them more easily.

Ensure that the Favorite column is displayed for your list of records by clicking **Actions** and selecting **Manage Columns**. Search for and select the Favorite field to add the column to the list of records page. You can change the order of the column with select and drag.

Click the heart icon to set or unset the favorite toggle for the records you want as shown in this sample screenshot.

My List for Opportunities

Show Smart List Equals true

Results 39

Group By None

	Win Probabi	Name ↕	Account ↕	Amount ↕	Close Date ↕	Sales Stage ↕	Favorite	Actions
☐	0%	DrawerTestOpty2	Iren's Fusion Account (New York, US)	\$ 4,395,504.2	11/29/22	Reference Event & De...	♥	...
☐	10...	Satya Opty 312323	Pinnacle Technologies (SEATTLE, US)	\$ 287,417.54	11/18/22	Closed	♥	...
☐	10...	Vario upgrade oppty	Pinnacle Technologies (SEATTLE, US)	\$ 500	11/18/22	03 - Lost	♥	...
☐	10...	Auto-OptyuYJmE...	ELI - Account	\$ 0	11/18/22	07 - Closed	♥	...
☐	35%	PRM Education Se...	PRM Education Services (Manhattan, US)	\$ 100,000	11/29/22	01 - Qualification	♥	...
☐	10...	Auto-OptyyOiZW...	ELI - Account	\$ 0	11/18/22	Contract Negotiation	Add to Favorites	...
☐	10...	OptyVisOrch	Iren's Fusion Account (New York, US)	\$ 0	11/20/22	Contract Negotiation	♥	...

My List

My List

My List shows accounts, contacts, leads, and opportunities that were recently accessed by you or that have an activity you're associated with. Items accessed more often get higher priority on the list.

You can open the list from the home page by clicking **My List** or, from the Sales Dashboard, by clicking the **View all** link. Use the search box to search for the item, or filter the display by item type. You can display the items in the list either as a list or as tiles by clicking on icons. You can take actions on items by using the **Actions** menu (three dots that appear both in the list and on each tile) or you can drill down on an item to view more details.

Act Directly on Items in My List

Take actions on any item on the list using the Actions menu. No need to drill down into the details.

To take action on My List:

1. Click **Actions** (the three dots) on an item.
2. Select an action. The action available depends on the type of item. For accounts, for example, you can create contacts, tasks, appointments, and opportunities. You can also take notes and you can send email to the primary contact.

Jump to Landing Pages from My List

My List saved search provides one click access to your work area landing pages like My Accounts and My Activities.

To jump to landing pages from My List.

1. Click in the My List search box to see the saved searches. For example, when you click in the box.
2. Click a saved search and you go directly to your landing page. Take action on your landing page records in the list view, or use the browser's back button to go back to the Smart List, and start over.

Tip: Up to 12 saved searches show by default in the search box. You can find any available saved search by entering a keyword in its name. For example, in the Smart List search box, enter "Vi" to find all saved searches with the letters "Vi" in them. Simply click on one of the search results to navigate to the relevant saved search.

Verify Phone Numbers and Email Addresses

Verify Phone and Email

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 an invalid 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.

You can see if the entry is invalid in two places:

- In the record overview at the top of the page, hover over the phone number or email address.
- In the details page, you see the invalid status right under your entry.

Here's a screenshot of a problem contact on the details page:

1

Contact Phone
(540) 555-1212

Invalid Verified On 7/15/21

1 2 3 4

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.
2	Date the phone number was verified.
3	Reverify to verify again. You never know when area codes or names change. What's valid today may not be in 6 months.
4	Overwrite button to manually set the status. If you know that the number or email is correct, you can set the status to Verified . The application now displays the status Overwritten on instead of Verified on .

If your entry is valid, you may not see a **Valid** status right away, depending on your setup. But a Valid status does eventually appear together with the date the phone number or email address was verified. You don't need a pat on the back, but your organization may want to check if the information is still valid at some point in the future.

Note: For leads, the application checks phone numbers only.

Overwrite an Invalid Contact Verification Status

Services aren't infallible. If you don't agree with the verification status for a phone number or email address, you can override it by clicking **Overwrite** (the icon highlighted in the screenshot).

1

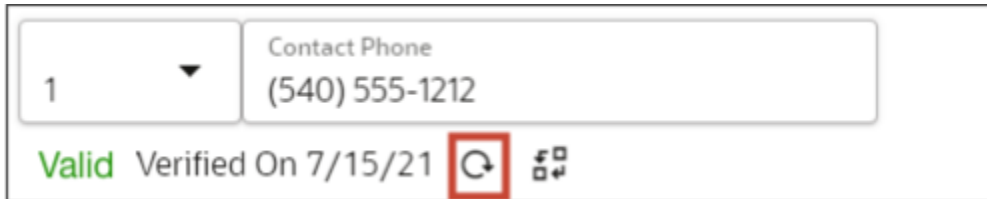
Contact Phone
(540) 555-1212

Invalid Verified On 7/15/21

Overwrite icon highlighted

Reverify a Phone Number or an Email Address

You can verify if a phone number or an email address is still valid by clicking **Reverify** (the circular arrow highlighted in the screenshot).



The screenshot shows a contact record interface. At the top, there is a dropdown menu with the number '1' and a downward arrow, followed by a text field labeled 'Contact Phone' containing the value '(540) 555-1212'. Below this, a status bar displays 'Valid' in green text, followed by 'Verified On 7/15/21'. To the right of the date is a circular arrow icon, which is highlighted with a red square, indicating the 'Reverify' function. Further to the right is a small icon representing a QR code or document.

3 Search and Lists

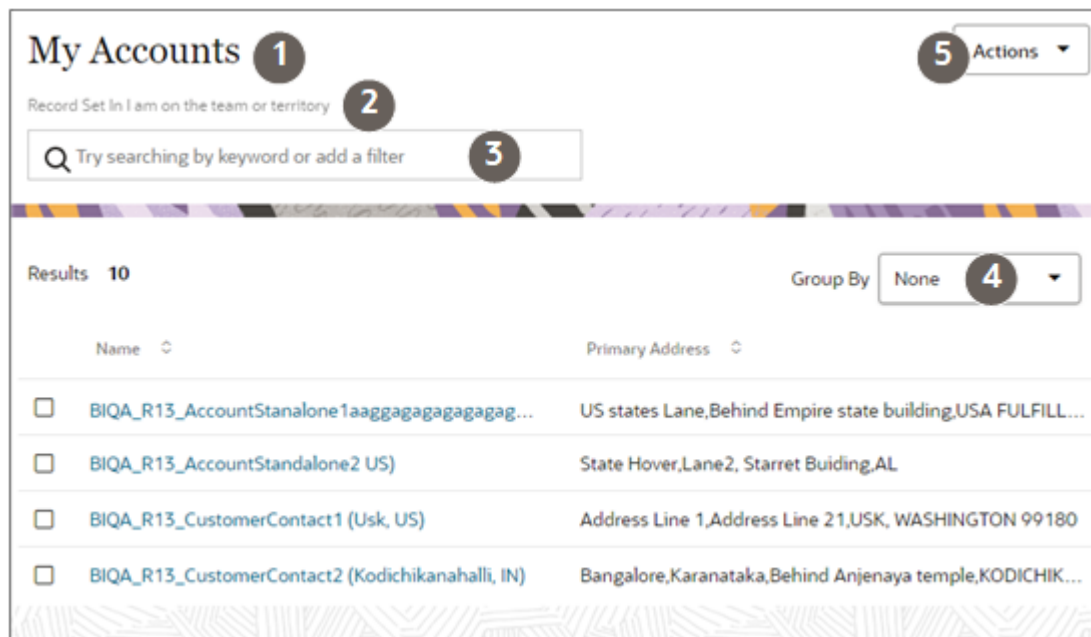
Search on the Landing Pages

Search gives you many ways to find the various types of records you work on throughout the day. To get started navigate to the work area you want to search.

You can search for records on any work area landing page, whether you're working on your contacts, activities, or many other records.

1. Put your cursor in the search field (callout 1 in the screenshot), and select a saved search as your starting point.

Remember that existing saved searches might already include filters. For example, the My Accounts saved search restricts the search to accounts where you're in the team or territory. The filters are displayed right above the search field (callout 2).



2. In the search field, enter filters and keywords:
 - o Filter results on a specific field. For example, to filter all the accounts in Boston:
 - i. Enter `city`.
 - ii. Select **Primary Address: City** to specify the address type.
 - iii. Select **Equals** as the operator.
 - iv. Enter the city name: `Boston`.

See [Filter a List](#) and [Filter by Numbers and Dates](#) for more filter options.

- o Enter keywords to search on and press return. See [Search Using Keywords](#)

3. More search options.

- Group your results by selecting the attribute to group by (callout 3).
- Change the columns displayed in the search results by clicking **Actions** (callout 4) and selecting **Manage Columns**.
- Change the order of the column with select and drag.
- Change the default sort order using the controls at the top of each column.

4. Save your search and criteria. (callout 5).

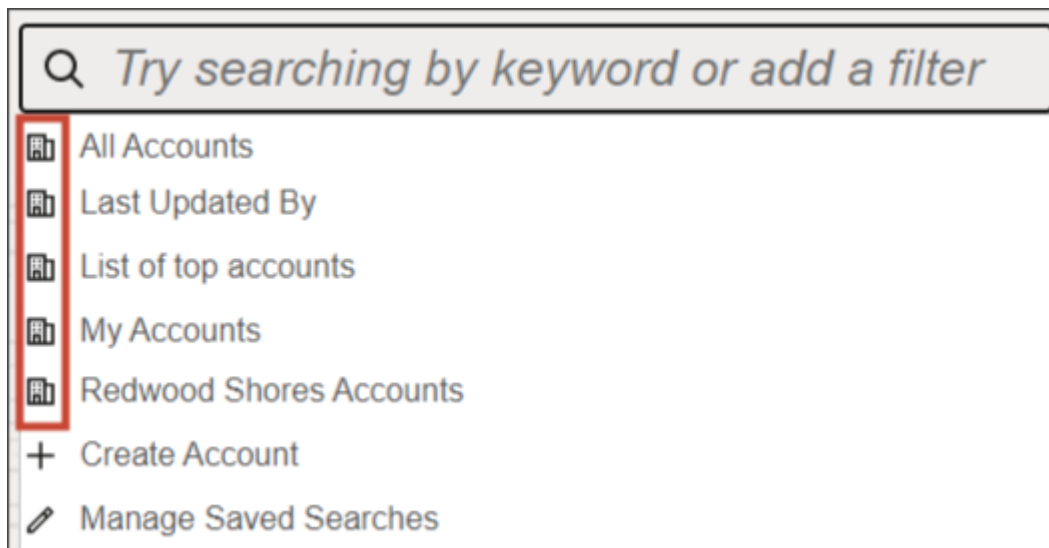
Related Topics

- [Should I Search by Filter or Keyword?](#)

Switch to a Different Saved Search

When you navigate to a work area, the list created by your default search displays.

1. Click in the search field.
2. Select the new search. Saved searches are identified by object icons in the list.



Search Using Keywords

Use keywords to optimize your search. Results match the name and details related to that keyword search criteria.

Saved Search Selection

The saved search you select as your starting point determines the scope of your keyword search. For example, selecting the All Accounts, searches all the accounts you can view. Selecting My Accounts searches all the accounts where you're a member of the sales team, or the sales territory.

Search Complete Words

1. Finish typing a complete word.
 - If you're searching for an item with multiple words in the name, enter any of the words. For example, a search for **Angeles** retrieves matches for the account names Los Angeles Rubber, and Angeles Warehouse. Your search also returns all accounts in the city of Los Angeles, all accounts on Angeles Street, and all accounts with Jessica Angeles as the primary contact.
 - Capitalization is ignored.
2. Press **Return**.

The application displays a list of records that contain your search term.

Search Partial Words, Exact Phrases, and Use Operators

You can search on partial words, exact phrases, and use operators between words.

- Use the star (*) symbol for missing characters or partial words. Use the symbol at the beginning, end, or middle of the search term.

For example, entering ***tion** finds all items ending with the letters **tion**. Entering the star symbol in the middle of a word such as **Pi*le**, returns Pinnacle, Pineapple.

- 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.

- 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 searching on addresses is enabled, 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.

Filter a List

Use filters to narrow down your search. You can filter using information in an Accounts, Opportunities, or Leads object, as well as information stored in related objects. You can also add multiple filters. The filter returns results using an implicit AND.

Let's say you want to filter your accounts by the number of calls made and opportunities by the address of that account. If you sell with partners, you can even filter opportunities using the addresses of the partners.

1. Click in the search bar.

2. Enter your filters:

- Some filters are numeric. Use a numeric Filter on accounts that have more than a certain number of leads, calls, contacts, and so on.
 - i. Enter "Number" in the search bar.
 - ii. Select the appropriate filter.
 - iii. Select the operator, such as greater than or less than.
 - iv. Enter the number.
- With other filters, such as city, state, country, or industry, select the value to filter from your data.
 - i. Enter `city` in the search bar.

All Opportunities

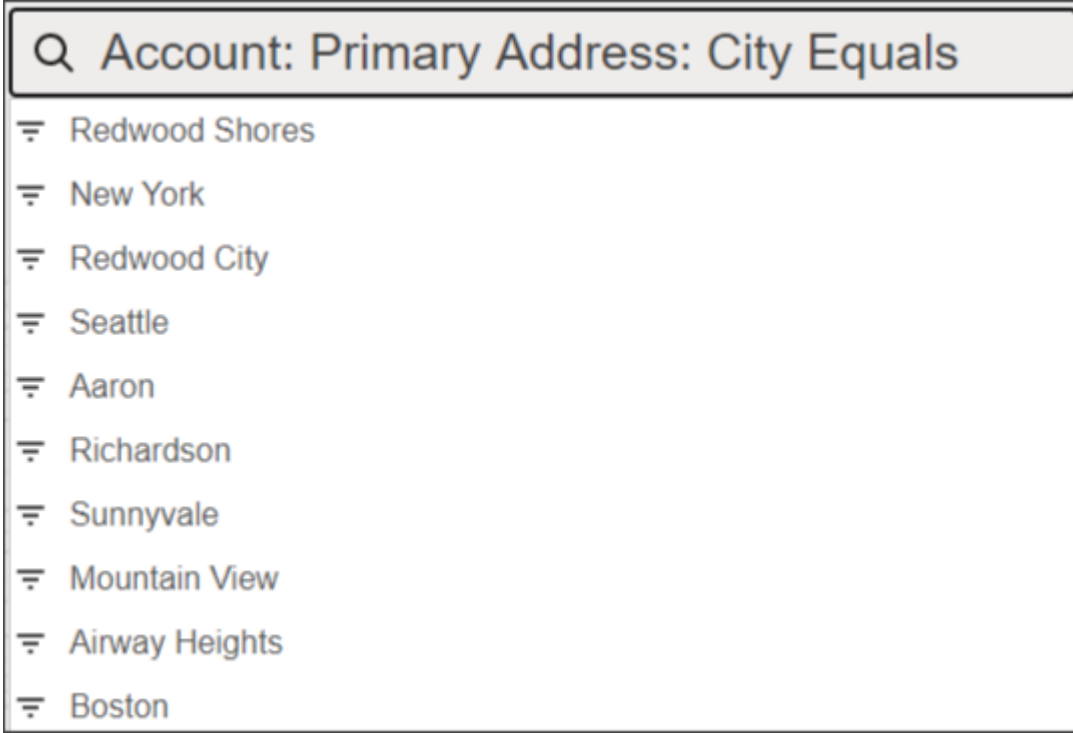
Close Date Between Previous 3 Years -- Next 365 Days

Q city

- Account: Primary Address: City
- Primary Partner: Primary Address: City
- Primary Partner: Public Address ID: City
- Partners: Partners: Primary Address: City
- Partners: Partners: Public Address ID: City

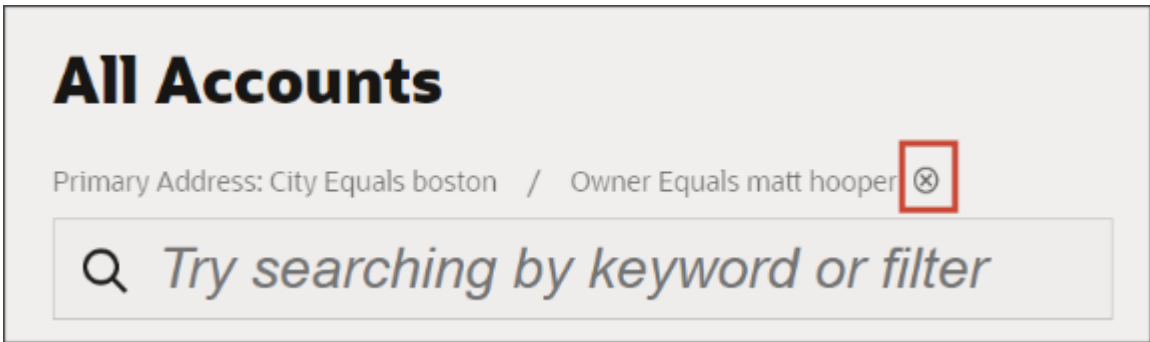
- ii. You might see multiple options, depending on the filter, the object you're searching for, and how search is configured.
 - If you're filtering opportunities by city, select **Account: Primary Address: City**. If you're working with partners, search the primary addresses of all the partners **Partners: Partners: Primary Address: City**.
 - If you're filtering accounts by city, search the primary address (**Account: Primary Address: City**) or include all the addresses in the search (**Account: Addresses**)
- iii. Select the operator. For city, the available operators are:
 - Equals
 - Contains
 - Starts With
 - Ends With
 - Exists
 - Is Missing
 - Not Equals

- iv. Now select one of the available values. The most frequently used are listed first.

A search bar with a magnifying glass icon and the text "Account: Primary Address: City Equals". Below the search bar is a dropdown list of city names: Redwood Shores, New York, Redwood City, Seattle, Aaron, Richardson, Sunnyvale, Mountain View, Airway Heights, and Boston. Each item has a small downward arrow icon to its left.

- v. Select more values from the list, or press **Return** to add the filter to the search.

Your filters display above the search bar.

A search bar with the title "All Accounts" in bold. Below the title, the filters "Primary Address: City Equals boston" and "Owner Equals matt hooper" are displayed, separated by a slash. A red square highlights a delete icon (a circle with an 'x') next to the second filter. Below the filters is a search bar with a magnifying glass icon and the text "Try searching by keyword or filter".

3. Remove a filter by hovering over it and clicking the delete icon.

Filter by Numbers and Dates

You can filter your list by ranges of numbers and date fields. You can also specify that you want to see results lower or higher than a number or a date. In some cases, you can select predefined ranges.

1. Click in the search field.
2. Search and select the numeric or date field from the drop-down list.

3. Select the range or operator from the list. For example, to display only opportunities with 2 or more revenue lines, you can select the predefined range ≥ 2 . To see those with between 5 and 10 lines, you select the Between operator and enter the range.

The screenshot shows a search interface titled "All Opportunities". Below the title is a filter range: "Close Date Between Previous 3 Years -- Next 365 Days". A search bar contains the text "Number of Revenue Lines". Below the search bar is a list of filter options, each preceded by a small icon:

- 0
- 1
- ≥ 2
- Between
- Equals
- Greater Than or Equal to
- Less Than or Equal to

Group and Summarize Search Results

You can group your search results by different attributes and display key information about each grouping. For example, group your accounts by the city where accounts are located and display the sum of the revenues in each. Different objects permit different groupings. You can group opportunities by sales stage and group leads by their status.

Group Search Results

To group your search results on the list page, select the attribute from the **Group By** drop-down list (callout 1 in the screenshot).

Your results are automatically grouped in collapsible sections (callout 2) with the count of records in each (callout 3). For example, grouping your leads by status, shows you how many leads are unqualified, qualified, converted, or retired.

All Leads Save

Group By: Status 1 ...

Try searching by keyword or add a filter

Results 269 3

- > Unqualified 2 Results 148
- > Qualified Results 84
- ▼ Converted Results 32

Rank	Lead Name	Existing Account	Existing Contact
Hot	Demo M Contact 5/18/21 4:28 PM	Pinnacle Technologies (Menlo Park, US)	Demo N Contact
Hot	Collin Wu-136947958 - Updated		Gabriel Collins
Hot	Abigail Harris 5/27/21 2:36 AM	Le Meridien Hotels (CEDAR PARK, US)	Abigail Harris
Hot	Abigail Harris - Le Meridien Hotels	Le Meridien Hotels (CEDAR PARK, US)	Abigail Harris

Summarize Revenue or Other Key Data in Each Grouping

Summarize key information such as the total revenue or total deal size, for each grouping. Here's how:

1. Click **Actions** (the three horizontal dots) next to the **Group By** list (callout 1 in the screenshot).

All Leads Save

Group By: Status 1 ...

Try searching by keyword or add a filter

Results 269 Total Deal Size 72234064.86 2

- > Unqualified Results 148 Total Deal Size 578298 3
- > Qualified Results 84 Total Deal Size 895723.54
- > Converted Results 32 Total Deal Size 759043.32
- > Retired Results 5 Total Deal Size 1000

2. Select **Manage Group By**.
3. From the Manage Group By window, **Aggregate Field**, select the attribute you want to summarize. For example, for leads, you might want to summarize each group by deal size.
4. From Aggregate Function, select how you want the summary information calculated. Select from:
 - o Average
 - o Maximum
 - o Minimum
 - o Sum
5. Click **Apply**.

Your list displays the totals for all the search results (callout 2 in the screenshot) and subtotals for each of the groupings (callout 3).

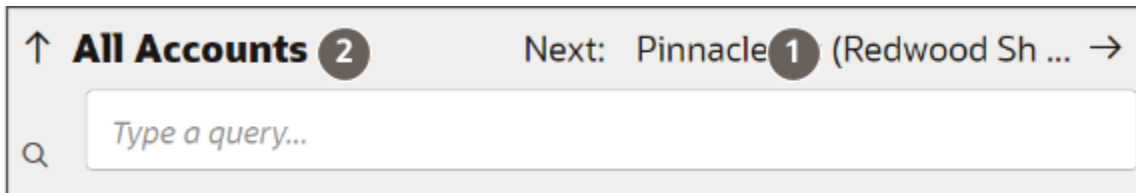
Group By Fiscal Quarter

You can filter records grouped by fiscal quarter rather than the default calendar quarter. Group by fiscal quarter can be really useful to list opportunities closing in the current and next fiscal quarters or to list leads generated in a previous quarter.

For example, you can search opportunities by Close Date by selecting the **By Fiscal Quarter** filter from the **Groups** drop-down list on the **Manage Group By** dialog.

Navigate to the Next Record

When you are working in a list, you can navigate to the next record by clicking Next (callout 1 in the screenshot). Clicking the name of the list or the up arrow (callout 2) takes you back to the list view.



Tip: To work all the items in the list, drill down in to the first record and then use **Next**.

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

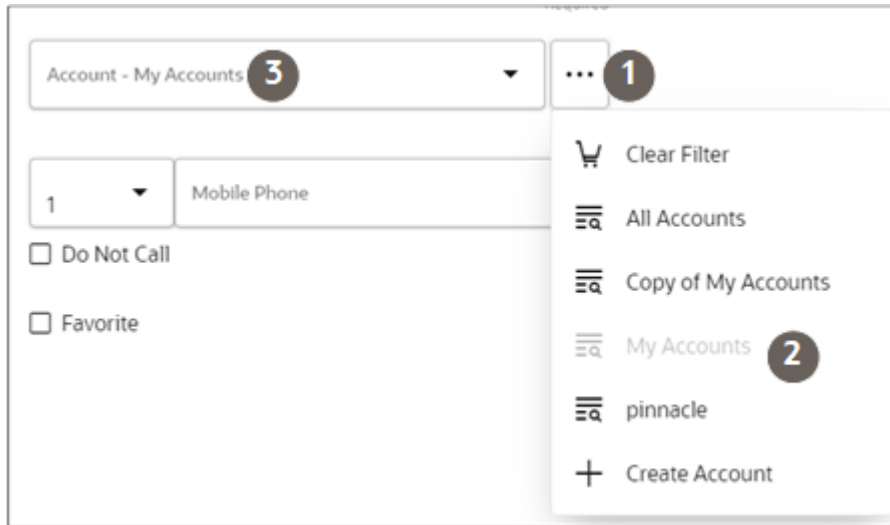
2. If the suggestions don't match what you're looking for, search using words in the name and related attributes. For example, if you're adding a contact to a lead or opportunity, you can search by contact name or by account name. Searching by the account name gets you a list of all of the contacts for 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.

Export Search Results

From the landing page, you can export up to 2,000 search results as either a Microsoft Excel or a .csv file. The exported file includes all of the columns displayed in your search results.

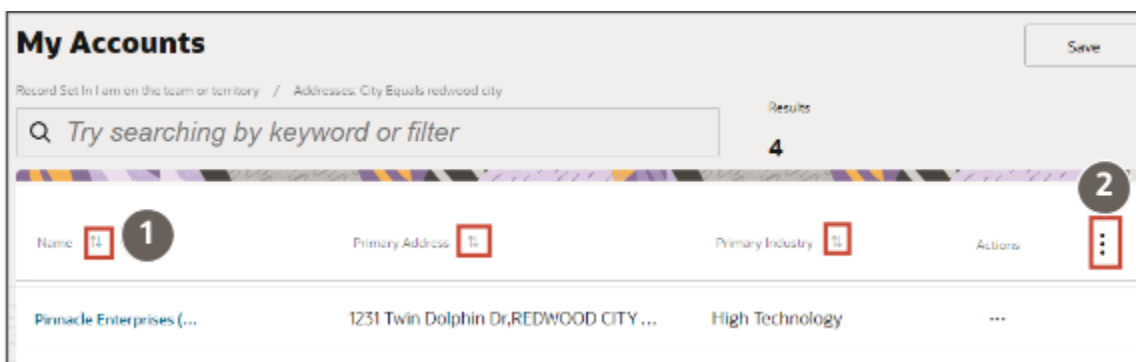
1. Make sure that the **Group By** field is set to **None**. You can't export grouped results.
2. Click **Export** and select the file format, either **Export to Excel** or **Export to CSV**.

The file downloads to your computer.

Change Fields Display in the List

You can change what fields display in the list of results, in what order they appear, and how the results are sorted.

- Change sort order by clicking on any of the sort icons (callout 1 in the screenshot).
- Change which fields appear in the results:
 - a. Click **Actions** (three vertical dots icon highlighted by callout 2 in the screenshot) in the results header.
 - b. Select **Manage Columns**.
 - c. Select the fields you want to display. You can search or scroll through the list.
- Change the order of columns:
 - a. Click on the column header.
 - b. Drag the column to the new place.
- Adjust column width.



Search for Resources

You can add any resource in the sales organization as the owner of a record or a task, as a member of the sales team, or as participant in an appointment. You can search for the resource by name, email, resource organization, manager name, and manager email.

Managers can narrow down the list to those resources they manage by selecting the **My Organization** saved search from the actions menu (three horizontal dots).



Administrators can modify which attributes are available for search. However, the My Organization saved search is provided by Oracle and is the only saved search available for resources.

Search FAQs

Should I Search by Filter or Keyword?

When you add a filter, you are filtering your results by a specific field. Searches are more general. For example, filtering your accounts by "city equals Boston", returns all accounts in the city of Boston.

By contrast, searching for Boston, returns accounts in Boston, accounts with contacts named Boston, and accounts on Boston street.

When should I Search With Filters?

Use filters for a more precise search. For example, using the filters "Existing Account: Primary Address: City Equals Boston" and "Existing Account: Name Contains Tech" searches specifically for accounts with the word Tech in the name with an address in the city of Boston.

Entering **Tech Boston** as keywords, returns potentially more records than accounts with Tech in the name with an address in Boston. Results may include accounts on Boston Street, accounts named Boston on Tech Street, and accounts with the word Tech in the name and contacts named Boston.

How are search results displayed?

When you select a saved search, the results get displayed in the order defined in the saved search. That order can be based on the sort order of a particular column. You can always specify your own sort order by clicking the header on the columns. When you do a keyword search, the sorting order defaults to sort 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.

If you decide to sort your results ascending or descending on a particular column, you can always return to the sort by relevance, by selecting **Sort by Relevance** from the Actions menu

4 Saved Searches

Saved Searches

Saved searches store all your search criteria, filters, and formatting. Use saved searches to create lists of useful information in each work area. For example, you can create a saved search to track accounts in a particular country, or a list of opportunities closing in the next month.

When you go to a work area, your default saved search set for that area runs. Select a different saved search by placing your cursor in the search field. Generally, search results display as a list on the landing page. You can also have saved searches for contacts and leads display the first item in the list.

Sales administrators predefine lists for different roles in the organization. Sales users have many ways to work with saved searches.

- Create saved searches of your own.
- Hide the ones you don't like.
- Specify which one you like to see by default when you open a work area.
- For the contacts and leads saved searches, you can view the first record in the list.

Manage Saved Searches

Configure which saved searches appear in each work area from the Manage Saved Searches page.

The Manage Saved Searches page anatomy.

The screenshot shows the 'Accounts - Manage Saved Searches' page. It features a table with columns for Default, Name, Created By, Shared With, Open As, and Actions. Three saved searches are listed: 'Accounts in Redwood City', 'All Accounts', and 'My Accounts'. The 'All Accounts' search is marked as the default with a star icon. Numbered callouts are placed as follows: 1 points to the star icon, 2 points to the search name, 3 points to the 'Created By' header, 4 points to the 'Shared With' header, 5 points to the 'Open As' header, and 6 points to the 'Actions' header.

Default	Name	Created By	Shared With	Open As	Actions
	Accounts in Redwood City	MHoope	Only Me	List	...
★	All Accounts	Oracle	Everyone	List	...
	My Accounts	Oracle	Everyone	List	...

Callout Number	Column	Explanation
1	Default	Indicates the saved search that you see by default. You can specify a different default using the Actions menu (callout 6).
2	Name.	Clicking on the name of the saved search displays the search results.
3	Created By	You can only delete or otherwise manage saved searches created by you.
4	Shared With	Unless you're a sales administrator, your saved searches are personal (Only Me). They can't be shared.
5	Open As	For lead and contact saved searches, you can open the first record in the list instead of showing the list itself. All other saved searches display as a list.
6	Actions	The Actions menu (three dots) displays the available actions for each saved search.

Save a Search

Saving your current search and your preferred way to display results is as simple as clicking **Save**. This saves your search, including search keywords, filters, columns, and sort order of the results.

1. Click **Save** on the landing page.
2. In the dialog box, enter the name for your saved search. Your saved searches are listed in alphabetic order.
3. Click **Save**.

Your new saved search is now listed with the other saved searches when you click in the search box.

Hide a Saved Search

You can't delete the existing prebuilt saved searches, but can hide any saved search from view.

1. Navigate to the work area.
2. Click in the search field and select **Manage Saved Searches**.
3. Click **Actions** (the three dots in the Actions column) for the saved search you want to hide and select **Hide from List**. This hides the saved search from your landing page list.

Set a Default Saved Search

You can set which saved search appears by default in a particular work area.

1. Navigate to the work area.
2. Click in the search field and select **Manage Saved Searches**.
3. Click **Actions** (the three dots in the Actions column) for the saved search and select **Set as Default**.

Rename or Delete a Saved Search

You can only rename or delete saved searches you created.

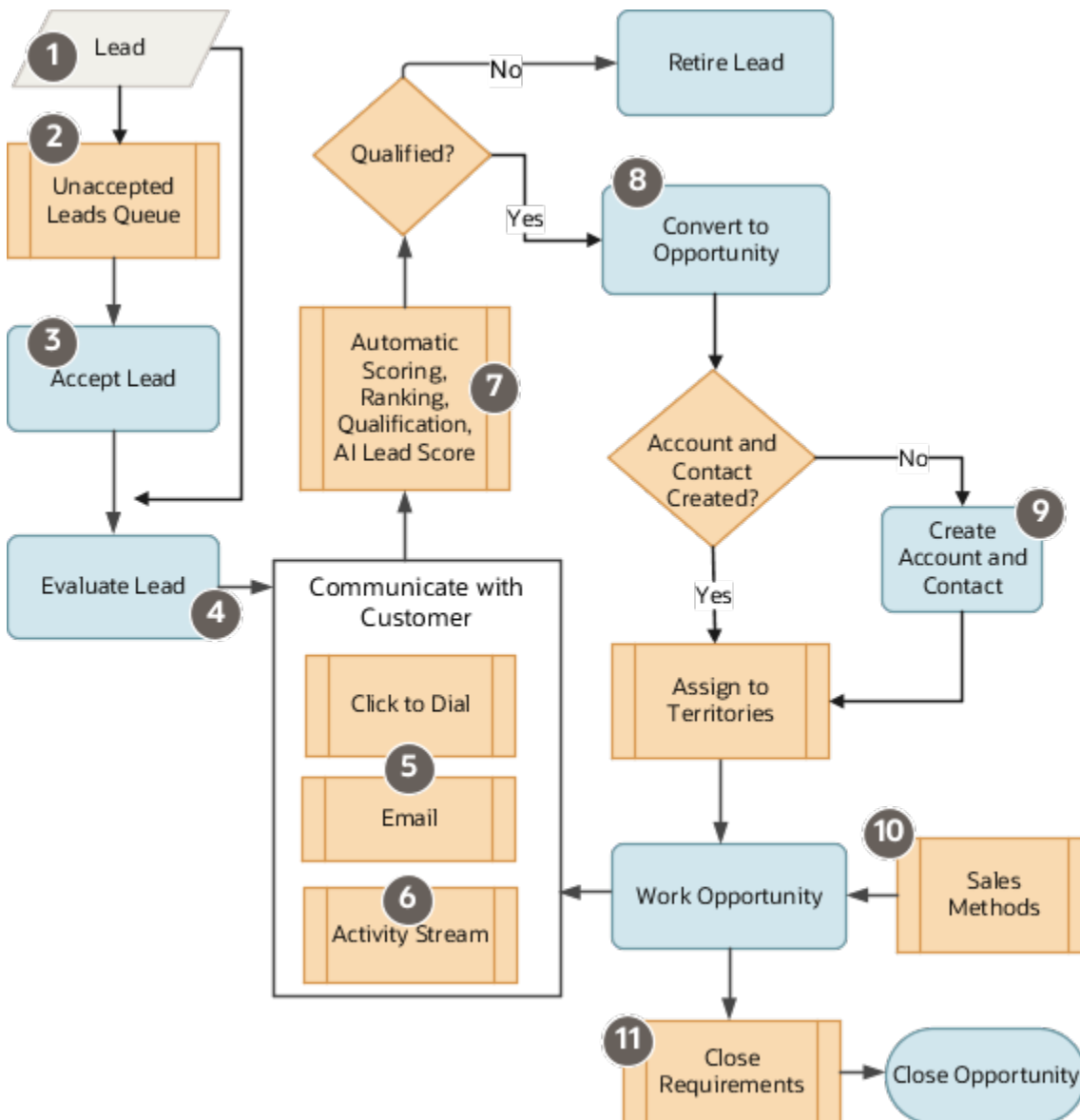
1. Navigate to the work area.
2. Click in the search field and select **Manage Saved Searches**.
3. Click **Actions** (the three dots in the Actions column) and select **Edit** or **Delete**.
4. If you're renaming, then enter the new name.
5. Click **Save**.

5 Leads

Create Leads and Close Deals

Sales is all about closing deals. But getting there takes many steps and knowing where you're at in the process at all times. Let's take a look at what it takes.

Here's a diagram of the different steps in the process of opening and closing opportunities.



Sales Process Steps	Digital Sales Features
Leads are created in the application or you import leads from outside sources (callout 1 in the process).	Both net new leads (new prospects) as well as existing customer leads (for renewals/upgrade/cross-sell or up-sell) are supported. When you create a lead with an existing customer, you can review key account and contact information. For a net new lead, you can add and update key company and contact information.
The lead gets assigned.	Depending on your setup, a lead is automatically assigned to a sales territory or put on a list of Unaccepted Leads (2) where members of the sales team accept the leads they are going to qualify (3).
Evaluate the lead and update lead information (4).	Use the built-in click-to-dial phone feature to call the prospect. Or you can email them right from the lead record (5). All the email conversations, call notes, and lead updates get stored in the activity stream (6) the team sees. If you receive a reply from a prospect, you're notified of the incoming email. You can see the reply as an email thread in the context of the lead. You can use customer data enrichment and address verification services to add valuable information to the lead, and you verify company names, contacts, and addresses. At any time, you can create an account and contact and add them to the lead.
Qualify the lead.	Your application administrator can create rules that automatically detect if required information is entered and score, rank, and qualify the leads that meet your organization criteria (7). Estimate the likelihood a lead will get converted into a deal from the AI lead score automatically calculated from on your past sales.
When the lead meets all the criteria for conversion, the lead owner converts the lead into an opportunity (8) They can assign it to another salesperson.	The administrator decides what lead information gets copied to the opportunity. When net new leads get converted to opportunities, any new accounts and contacts are created automatically (9). The administrator decides what lead information gets copied to the newly created contact and account.
Guided by the sales method defined for each sales situation (10), the opportunity sales team works to close the deal.	The sales team creates different sales methods for different sales situations. Each sales method can take salespeople through different sales stages and steps.
The sales team closes the opportunity when the deal is won or lost. If a deal is lost, the sales organization may require you to enter competitors and the reasons why the deal was lost.	Sales administrators can specify if competitor and close reason entry are required (11).

Lead Types

If you want to pursue a lead with existing customer for renewal, upgrade, up-sell, cross-sell, or maintenance service, you create a lead for an existing account and contact.

If the lead is for a new prospect or for a new contact, you have two options:

- You create the account and contact before you create the lead
- You temporarily store the account and contact names as text in the net new lead itself.

Net new leads keep the account and contact information in the lead itself as text until it's verified. You can use the Existing Contact and Existing Account fields to enter both types of leads. You can enter the account and contact as text or you can select an existing account and contact.

Here's a screenshot highlights the **Existing Account** and **Existing Contact** columns. Existing account and contact records show up as links. Net new information shows up as plain text.

My Open Leads

Status Equals Qualified , Unqualified / Record Set in Records I own

Q Try searching by keyword or add a filter

Results 798

Group By None

Rank	Lead Name	Existing Account	Deal Size	Status	Creation Date	Existing Contact
☐	Derek J Smith 02/Jul/2022 10...	Main Account (Markham, CA)		Unqualified	02/Jul/2022 03.17 PM	Lisa Pickford
☐	DV-Leed-Feed-Search-Filterin...			Qualified	20/Jun/2022 04.51 PM	
☐	DV-Leed-Feed-Search-Filterin...			Qualified	20/Jun/2022 04.55 PM	
☐	DV-Leed-Feed-Search-Filterin...			Unqualified	20/Jun/2022 04.52 PM	
☐	ELI Lead			Unqualified	05/Jul/2022 11.15 AM	Janice Li
☐	ELI Lead 2			Unqualified	05/Jul/2022 01.41 PM	Janice Li
☐	jen 06/Jul/2022 11.39 AM	AM Org3 (REDWOOD CITY, ...		Unqualified	05/Jul/2022 11.09 PM	jen

Create a Lead

You can create a lead in multiple ways: from a contact, from an account, and from the home page. Here are some tips to save you time:

- If you know the account and contact don't yet exist in your application, you can enter the account and contact names in the lead as text. As you type account and contact names, the application suggests any matching accounts and contacts. If you find right match, you can select it. If not, you can continue with typed values to create a net new lead.
- If you know that both the contact and account exist in your application, then create the lead from the contact. When you do, the lead gets automatically populated with the account and contact information. When you start with the contact, you also get an overview of the existing leads associated with the contact and the history of past interactions with the contact.
- If you know the contact is a new contact for an existing account, you can create the contact first and then create your lead. Or you can review the account information first and create the contact and lead from there.

Create a Net New Lead

Here's how to create a net new lead, which stores the account and contact information in the lead. You can have the application create the account and the contact automatically after you verify the lead information.

1. On the home page, click **Create Lead**. Alternatively, in the leads list page, click in the search bar and select the same action.
2. In the Create Lead page, enter the contact name in the **Primary Contact** field. If there's no existing contact with that name, select the name again from the drop-down (callout 1).

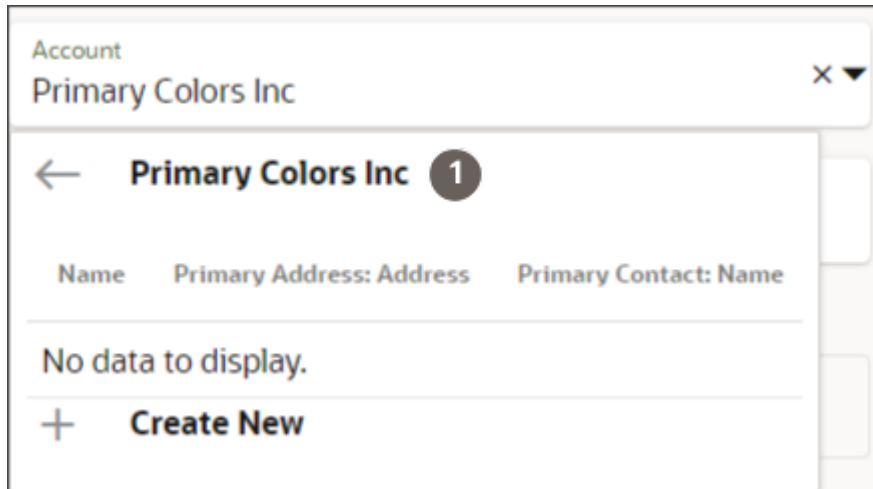
Create Lead

Primary Contact
James Norton

← **James Norton** 1

Name	Job Title	Primary Account: Name	Matched Text
No data to display.			
+ Create New			

3. Enter the rest of the lead information. For account, enter the account name in the **Account** field (highlighted by callout 1 in the screenshot).



4. Click **Save**.
5. You can now take any of the available actions on the lead. Just put your cursor in the Action Bar, enter the action, and press **Return**. Here are some examples:
 - To indicate product interest, for example, enter `add` and select **Product** from the list.
 - To send an email, enter `email`.
 - To call the contact in the lead, enter `call`.

Create a Lead from the Contact

1. On the home page, click **Contacts**.

The page displays a list of contacts generated by the default saved search specified by your application administrator. Each saved search comes with predefined filters that restrict what contacts you can search. For example, the My Contacts list displays all the contacts where you're listed as the owner.

2. Click in the search bar and select the appropriate saved search. For the broadest search, select **All Contacts**. This saved search displays all of the records you have permission to see.
3. Enter the contact name in the search bar. Include both first and last name in your search for common names.
4. Press **Return** to initiate the search.
5. Click the contact name in the search results.
6. In the contact page click in the Action Bar and enter: `create`, and select **Create Lead**.
7. In the Create Lead page, edit any of the defaulted information.
8. Click **Save**.
9. You can now take any of the available actions on the lead. Just put your cursor in the Action Bar, enter the action, and press **Return**. Here are some examples:
 - To indicate product interest, enter `add` and select **Product** from the list.
 - To send an email, enter `email`.
 - To call the primary contact in the lead, enter `call`.
 - To qualify the lead, enter `Qualify`.

Accept a Lead to Work On

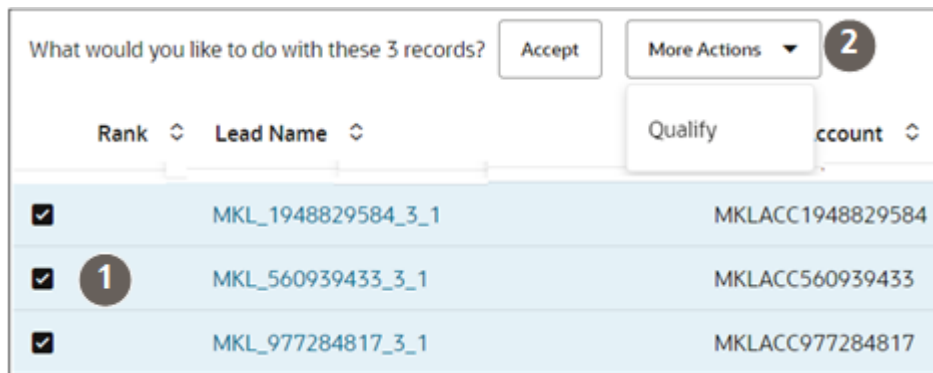
Here's how to accept a lead for you to work on. By accepting the lead you become its owner and the lead shows up in your My Open Leads list.

1. In the leads list page, click in the search box and select the New Unaccepted Leads saved search.
2. There are two ways to accept a lead:
 - o From the list page:
 - i. For the lead you want to work on, click **Actions** (the three dots).
 - ii. Select **Accept**.
 - o While viewing the lead details:
 - i. In the **Action Bar**, enter **Accept**.
 - ii. Select the **Accept** action.
3. Confirm that you're accepting the lead.
4. To view more unaccepted leads, click the list name or the up arrow to return to the list, or click **Next** on the top right side of the page to open the next lead in the list.

Accept or Qualify Multiple Leads at the Same Time

In the list view on the Leads landing page, you can accept or qualify multiple leads at the same time.

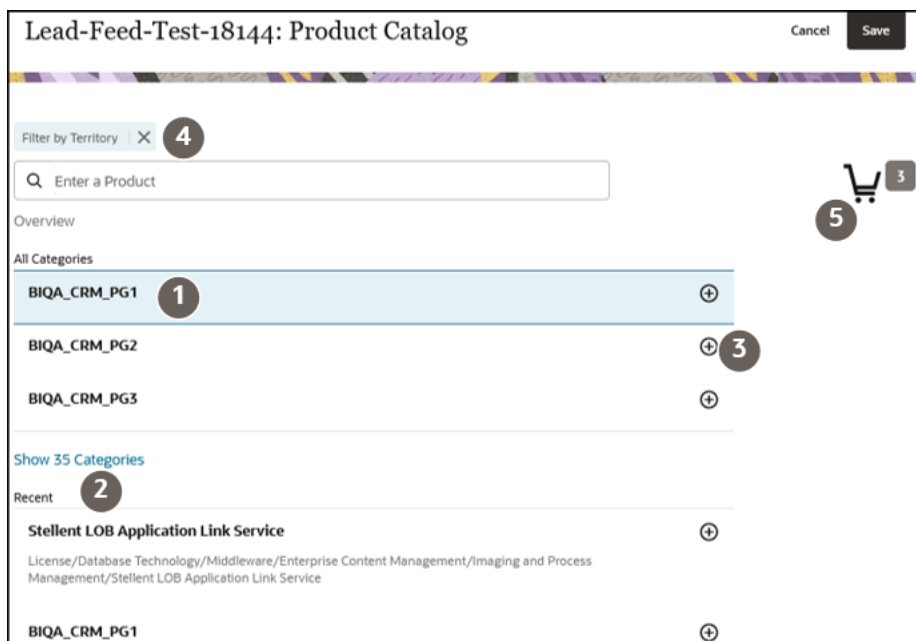
1. On the Leads landing page, select the leads you want to take action on (callout 1 in the screenshot).
2. Select one of the actions (callout 2). Which actions are available depends on which leads you selected. For example, if you select 4 unqualified and unaccepted leads you can both accept and qualify. If 2 of the 4 are already accepted, then the only action available is Qualify.



Add Products to a Lead

Here's how to add products to a lead. You can add either individual products or product categories that the customer is interested in purchasing.

1. Open the lead that you want to update.
2. In the Action Bar, enter **add** and select **Add Products**.
3. You can add multiple products or product categories to the lead in one of two ways:
 - You can browse the Product Catalog by clicking on product category names (callout 1). As you browse, you can add multiple items to the lead by clicking the plus (+) icon (callout 3).



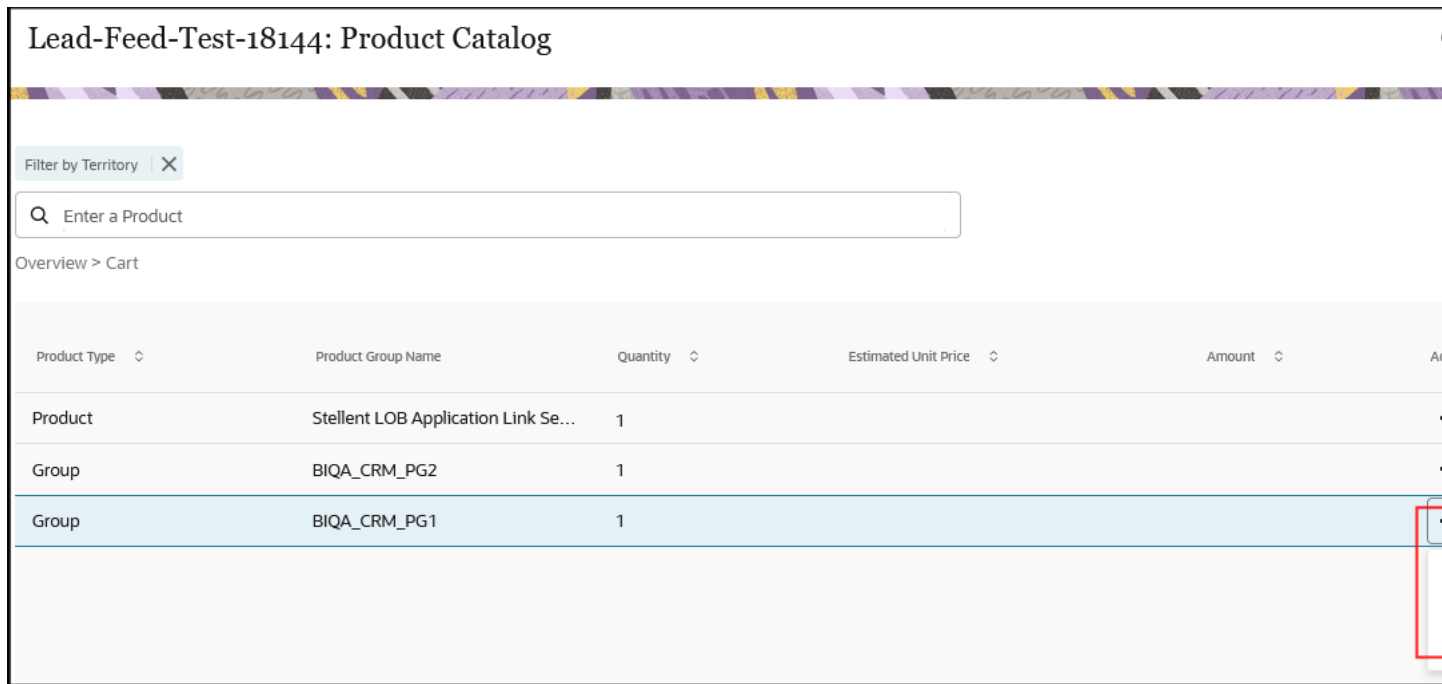
You can also select from the list of recent items displayed at the bottom of the page (callout 2).

Note: Depending upon how the application is configured, your default view of the products list may be filtered to show only the products or product groups in your assigned territories. If this is the case, 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 (callout 4). 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 (callout 5) to change or add pricing and quantity information, or to delete products and replace them with others:
 - 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**.

Update Lead Information

Here's how to update lead information:

- To update basic information, such as the primary contact, account, address, and so on, click **Lead Details** and **Edit**.
- Use the Action Bar to update individual fields:
 - Enter **update** and select the field you want to update, including account name, contact phone, description, and so on.
 - Enter **add** to add information such as contacts, team members, and attachments.
 - Enter **create** to add notes, tasks, and appointments.

Here's a screenshot showing the Edit Lead window you see after you enter **update** in the Action Bar and select **Update Contact Phone**:

The screenshot shows the 'My Open Leads' section of the Oracle Fusion Cloud Sales Automation interface. At the top, there's a header 'My Open Leads' with a 'Next: Bruce Greenwood' link. Below this is a search bar with the placeholder 'Type a query...' and a 'Lead Details' button. The main content area displays the lead details for 'Adam Waterh.' (Primary Contact: Adam Waterhouse, Job Title: Director Application Integration). An 'Edit Lead' form is overlaid, featuring a dropdown menu with the number '1' and a 'Mobile Phone' field containing '(206) 350-7788'. At the bottom right of the form are 'Cancel' and 'Save' buttons.

When you enter a phone number, the application automatically checks if the number is a valid number. If the number can't be dialed, you see an invalid status and the date the phone number was verified. If nothing appears, the information is valid and you're good to go. For details, see the [Phone Number and Email Verification](#) topic.

Predict Lead Conversion Using AI Scores

You can get an idea of the likelihood a lead will be converted to an opportunity from its AI Lead Score. The application calculates the score, which can range from 0 to 100 percent, by finding patterns in past leads.

Just as with any other AI feature, the accuracy of the prediction depends on the available historical data. If the AI Lead Score field isn't visible on the list page, you can expose the field as a column.

Qualify a Lead

When you have verified the information in a lead, you can set the status to Qualified. Your application administrator can also set up rules to check for the presence of any required information and qualify the lead automatically. Qualifying a lead can trigger the assignment of that lead to a sales territory.

1. Open the lead.
2. Enter `qualify` in the Action Bar and press **Return**.
3. Confirm the action.

Convert a Lead Into an Opportunity

You can convert a qualified lead into an opportunity. During the process, you get a chance to change the name of the opportunity, assign a different owner, and change the account and primary contact.

1. Open the lead.
2. Enter **convert** in the **Action Bar** and press **Return**.
3. In the Convert Lead window, you can change the opportunity name, enter an account and contact, and reassign opportunity ownership.

4. Click **Submit**.

The application displays the new opportunity in the current tab replacing the leads work area. The conversion process copies key information from the lead into the opportunity and links the converted lead to the new opportunity. Copied information includes notes, interactions, and conversation messages from the lead activity stream.

Retire a Lead

Here's how to retire a lead:

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**.

Add an Attachment to a Lead

You can add files or URLs as attachments. Here's how:

1. Open the lead.
2. Enter **attach** in the Action Bar.
3. Press **Return**.
4. In the Attach window, you can:
 - Drag and drop your files.
 - Click **Add** (the plus sign) and select a file to attach.
 - Enter a URL and click **Add URL**.
5. Click **Close**.

Delete a Lead

You can delete individual leads. Here's how:

1. Open the lead by clicking its name in a list.
2. Enter **delete** in the Action Bar.
3. Press **Return**.
4. Confirm that you want to delete the lead.

View Lead Details in Oracle Eloqua

You can view details about a lead coming from Oracle Eloqua by opening up the lead and clicking the Digital Profile link in the lead summary section. The link displays only for leads coming from Oracle Eloqua.

6 Accounts and Contacts

Accounts

Accounts Overview

Accounts are the existing customers and prospects you do business with. You can store and organize the information about a customer or a prospect in an account record. Your sales team can use the information in the account records to interact with new and existing accounts, keeping your team informed and engaged with opportunities to build sales revenue.

From the Accounts work area, you can:

- View all of your accounts.
- View account information.
- Reach account contacts by email or phone, directly from the account.
- Track account conversations.
- Identify and create opportunities and leads.
- Expedite and close active deals.
- Identify and complete subscriptions.
- Create and resolve service requests.

This table highlights some of the key details:

Key Details	Description
Account basic details and size	• Learn about the industry of an account and an account's location. • View contact details, such as phone and email. • Get the website address to browse and understand the business areas. • Know the annual revenue and total employees to get an idea of how big the organization is.
Account health	• View account news, such as environmental, marketing, or business events.
Selling opportunities	• View assets. • View total revenue generated from previous purchases. • View active deals and new and in-progress quotes and orders. • View closed service requests.
Decision-making contacts	View contacts associated with an account. Understand contacts' buying roles and affinities.
Past activities	• View the date last contacted by email or phone.

Key Details	Description
	Get the details of an interaction and notes entered by the sales team.

Accounts Landing Page

The Accounts landing page shows the default saved search that you or your administrator has set. For example, if the All Accounts view is your default saved search, the Accounts page shows all of the accounts created in your organization. You can change the view to My Accounts to see only those accounts for which you're on the team or territory.

Click an account to see the details.

Account Information

When you click an account, you see the account summary, activities on the account, and hierarchy details in the panel view. The related information, such as opportunities, leads, and contacts of an account, are in the panel view too.

Hierarchy

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 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.

The Related Objects of Accounts

See the account-related details in the panels view.

Contacts

The Contacts panel:

- Shows the contacts associated with an account, sorted by the last updated date.

- The phone number appears as a link for a contact. Click the link to make a call using the built-in telephony.
- To see the complete list of contacts, click **View All Contacts**.

Opportunities

The Opportunities panel:

- Shows the rolled-up value of potential revenue from open opportunities.
- Opportunities are sorted by the last updated date, current stage, and the expected revenue from the opportunity.
- To see the complete list of opportunities, click **View All Opportunities**.

Leads

The Leads panel:

- Shows the rolled-up value of the number of open leads and potential revenue from the leads.
- Leads are sorted by the last updated date, status, lead score, and deal size. You can also see the related leads and can navigate to their details.
- To see the complete list of leads, click **View All Leads**.

Quotes and Orders

Note the following about the Quotes and Orders panel:

- You can see the Quotes and Orders panel only if it's enabled. Otherwise, use the Action Bar to view the quotes and orders of the account.
- The panel lets you see the potential revenue from open and processing orders, as well as revenue earned from closed orders. Quotes and orders are sorted by the last updated date.
- To see the complete list of quotes and orders, click **View All Quotes and Orders**.

Service Requests

The Service Requests panel:

- Shows the rolled-up value of the number of critical service requests and the total open service requests on the account.
- Service requests are sorted by status, criticality, and the last updated date. You can also see the related service requests and can navigate to their details.
- To see the complete list of service requests, click **View All Service Requests**.

Assets

The Assets panel:

- Shows the rolled-up value of the number of active assets of an account.
- Assets are sorted by the status, unit price, and the last updated date.
- To see the complete list of assets, click **View All Assets**.

Create an Account

Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B), and Oracle Address Verification Cloud integrations support account creation. Here's how you add an account:

1. On the Create Account page, enter a name to get the closest matching businesses, powered by D&B.
2. Select the organization. The details, such as the address, contact, phone, and email are filled in automatically.

Your administrator can enable all the fields that are mapped with D&B on the Create Account page to get the entire firmographic data.

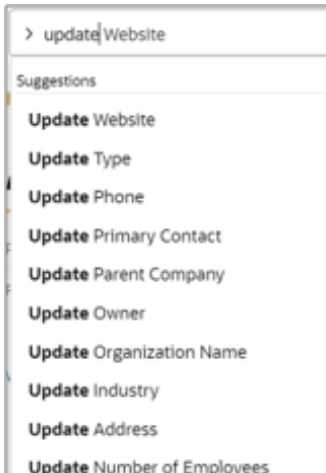
3. Select an **Account Type**, which will be Customer or Prospect. Customer is the organization you're already doing business with and Prospect is a potential buyer.
4. Click **Create**. The data quality tool for deduplication checks for duplicate accounts and shows them in a dialog box. You can proceed with creating an account or cancel the process and update a matching account.

The screenshot shows the Oracle 'Create Account' interface. On the left is a sidebar with the Oracle logo and a search icon. The main area is titled 'Create Account' and contains two sections: 'Basic Details' and 'Address Details'. The 'Basic Details' section includes fields for Name (filled with 'Inspire'), Web Site (filled with 'www.inspire.com'), and Phone. There is also a 'Favorite' checkbox. The 'Address Details' section includes fields for Country (filled with 'United States'), Address (filled with '789 Main ST'), Address Line 2, City (filled with 'Bellevue'), State (filled with 'WA'), and Postal Code (filled with '98004'). A 'Verify Address' button is at the bottom of this section. Overlaid on the right side of the form is a dialog box titled 'Check if this account already exists.' It contains the text: 'We found some similar accounts that exist already. Do you still want to create the account?'. Below this text is a section titled 'Existing Accounts' which lists two entries: 'Inspire Equipment' at '1213 Main ST, Bellevue, WA' and 'Inspire Uplift' at '242 15th Ave, Beaverton, OR'. At the bottom of the dialog box are 'Cancel' and 'Create' buttons.

Account Updates

Use the Action Bar to update a single detail of an account, such as the phone, contact, or website.

Here's a sample of the Action Bar retrieving "update" items:



If you have changes to the basic information of the account, go to the Account Properties page by clicking **Account Details**. Make the changes and save.

The Action Bar Functions on an Account

Use the Action Bar to see the attachments and sales team of an account.

Using the Action Bar, you can perform all the **Create**, **Update**, **Show**, and **Add** actions relevant to an account. For example, use the Action Bar to create an appointment, update an address, or show attachments.

See the [Action Bar](#) in the Basics chapter of this guide for more information.

See Similar Accounts for an Account in Oracle Sales

If your administrator has enabled a Similar Accounts Machine Learning model, you can see similar accounts for an account in Oracle Sales.

Similar accounts are the accounts that have something in common with the main account you're looking at. The commonality could be in organization size, revenue, location, account score, or any other account attribute.

Your sales administrator decides the attributes when building a machine learning model for similar accounts. See [Create a Similar Accounts Model](#) to learn more about building the models.

Here's how you can see the similar accounts:

1. Navigate to **Redwood Sales > Accounts**.
2. On the Accounts landing page, click an account.

The account foldout view appears.

3. In the Action Bar, type **Show Similar Accounts**.

The similar accounts list appears.

Similar Accounts for an Account

Here's a screenshot that shows the similar accounts found by the Sales Machine Learning engine for a given account. Callouts from 1 to 5 in the screenshot highlight the columns that show details of the similar accounts. These columns are the attributes on which the model is built. Hence, you might not see the same columns every time.

If your administrator builds a new model with different attributes, the columns will change.

The screenshot shows the 'Armstrong World Industries, Inc.' account page. Below the account name is a 'Go to Overview' link. A table displays similar accounts with the following columns: Account Name (callout 1), Primary Contact (callout 2), Industry (callout 3), Last Touched (callout 4), and Won Opportunities Revenue (callout 5). The table lists five similar accounts, all in the 'High technology' industry, with varying last touched dates and revenue.

Account Name	Primary Contact	Industry	Last Touched	Won Opportunities Revenue
Inc	Shannon Guthrie	High technology	2 days ago	\$50,000
Enterprise Group	Ben Simmons	High technology	5 days ago	\$45,000
Group Ltd.	Aden Aguilar	High technology	8 days ago	\$35,000
Corp.	Isaak Butler	High technology	10 days ago	\$30,000
Inc.	Stanley Newman	High technology	14 days ago	\$25,000

The table here describes the columns highlighted in the sample similar accounts. This will give you an idea of the data you get from the model.

Callout	Column	Description
1	Account Name	Shows the name of the account that has some similarity with the given account. Click the account name to get to its foldout view and learn more about the account.
2	Primary Contact	Shows the primary contact associated with the account. Click the primary contact to get to the contact's foldout view and learn more about the contact.
3	Industry	This column appears if Industries is selected as one of the attributes for the model. Shows the industry of the account.
4	Last Touched	This column appears if Last Touched is selected as one of the attributes for the model. Shows the date or number of days when the account was last contacted either by phone or email. The calculation type for a date attribute can be in days, as an age bucket, number bucket, category, and so on. If your administrator used an age bucket, you'll see the last touched in the x days ago, format, as depicted in the screenshot above. Your administrator can show this in dates as well. For example, 02-04-2022 to represent Feb 4, 2022.
5	Won Opportunity Revenue	This column appears if Won Opportunity Revenue is selected as one of the attributes for the model. Shows the revenue from the opportunities that are in Won status.

- Related Topics
- Overview of Sales Machine Learning

See Sales Invoices for an Account

If your administrator has enabled displaying the invoices for an account, you can see the Invoices panel on the Account foldout view.

The Invoices panel shows invoices in the order of transactional date. The panel shows the invoice number, the total amount due, and the number of days past the due date.

Click the **View All Invoices** link to see the invoices. You can also type in **Show Invoices** in the Action Bar on an account foldout view, to see the full list of invoices of an account.

Invoice Statuses

Invoices of an account are in one of these statuses:

- Overdue
- Due
- Due Now
- Paid

Here’s a screenshot showing the color codes of the statuses.



The table describes the invoice statuses.

Invoice Status	Description
Overdue	This badge appears for invoices that are past the due date.
Due	This badge appears for the invoices that are due 10 to 30 days from today.
Due Now	This badge appears for the invoices that are due in 10 days.
Paid	This badge appears for fully paid invoices.

Review the outstanding invoices and plan a follow-up with the customer to get the dues cleared.

Contacts

Contacts Overview

The Contacts work area gives you a full picture of business contacts that are associated with an account or an opportunity. It also shows standalone contacts.

You can interact with a contact right from the work area and see all the scheduled appointments and tasks with a contact. From the Contacts work area, you can:

- View all your contacts.
- View contact summary.
- Send a contextual email.
- Make a call.
- View the LinkedIn and Eloqua profile.
- View activities.
- View opportunities.
- View leads.
- View service requests.

Contacts Landing Page

The Contacts landing page shows you the list of contacts you own. You can search for a contact and click it to see the details.

Contact Information

Contact information includes basic details, such as job title, work phone, email, and the account they're associated with. The related information, such as opportunities, leads, and service requests, is shown in the panel view.

Send a Contextual Email

You can email using Send Email from the Action Bar, or by just clicking the email link. Like a regular email, you can also send attachments.

After you send the email, you view the conversation in the activity panel of the contact. If a contact replies to the email, you view it as a thread in the original email. You can reply and forward emails as well.

Related Topics

- [Email Integration Options for Oracle Sales in the Redwood User Experience](#)

Make a Call

Click the contact phone link to make a call or receive a call from the contact directly in a work area. You can put notes right in the contact record. Call interactions and notes are available in the activity feed. See the Calls chapter to learn more.

Schedule Appointments and Create Tasks

Use the Action Bar to create an appointment. Appointments can be calls, meetings, chats, emails, texts, or web conferences.

Use **Create a Note** to make a quick note of things you want to discuss with this contact. **Create Task** lets you add a quick list of tasks related to the contact.

Related Topics

- [Place an Outbound Call](#)

Access Social Profiles

Access the LinkedIn and Eloqua profiles of a contact.

LinkedIn Sales Navigator

The integration with LinkedIn Sales Navigator maps the LinkedIn profiles with sales records and shows relevant contact and lead details. You can open LinkedIn Sales Navigator from the contact's basic information region.

Note: To use LinkedIn Sales Navigator, you must have a LinkedIn account.

Click the LinkedIn link on a contact basic information to [see the LinkedIn profile](#) of the contact.

Eloqua

You can access a contact's Eloqua profile as well. You can track the interactions the contact had with your website or with marketing emails you sent them. You see details such as the number of times the contact read your email, the number of visits the contact made to your website, or content the contact downloaded from your website.

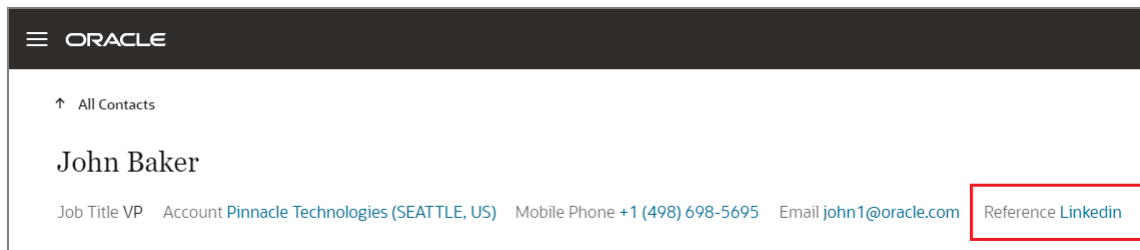
See the LinkedIn Profile of a Contact

Here's how you can see the LinkedIn profiles of the contacts:

1. Navigate to **Digital Sales > Contacts**.
2. Open a contact from the landing page.

3. In the contact basic information area of the Contact foldout view, you find the **Reference** label that shows the **LinkedIn** link. Click the link.

Here's a screen shot of an example contact that highlights the LinkedIn link appearing in the contact's basic information.



The LinkedIn Sales Navigator instance opens in a new tab.

4. Sign in to LinkedIn Sales Navigator.

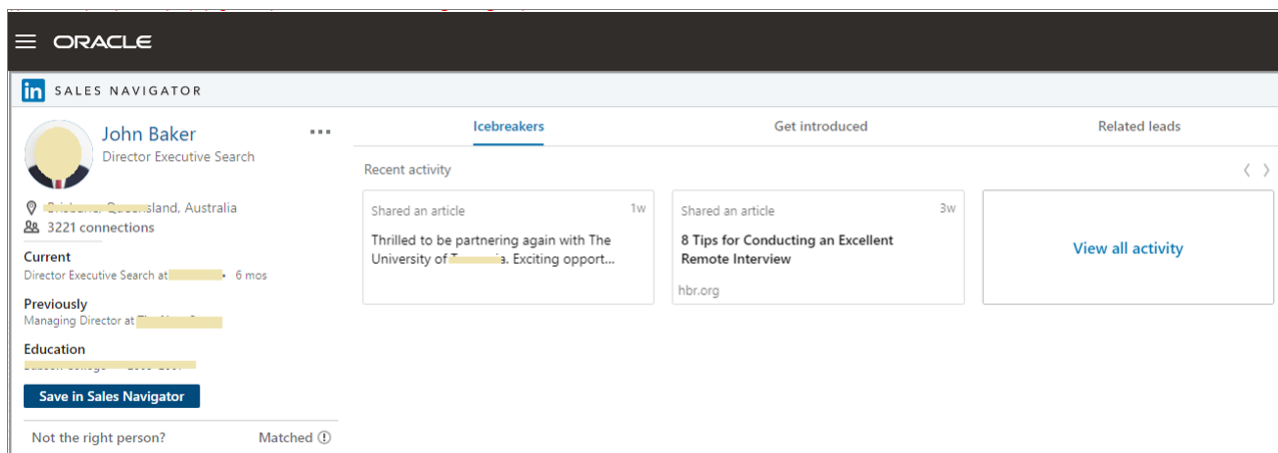
The tool finds and shows matching profile for a contact.

Note: For you to use LinkedIn Sales Navigator, your administrator needs to enable it on the contact's foldout view, and you need to have Team or Enterprise licenses.

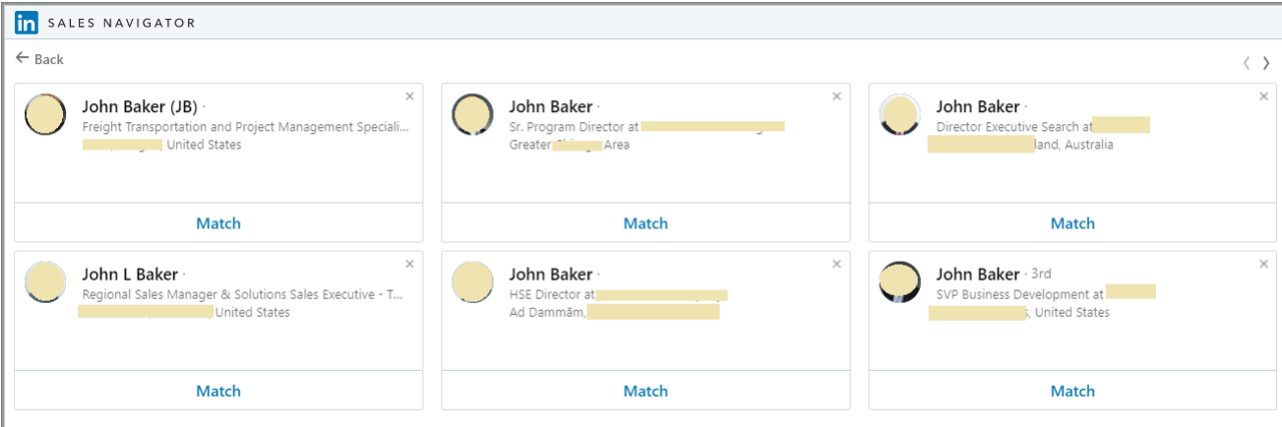
LinkedIn Sales Navigator Finds Matching Profile

When you click the LinkedIn link from the contact's page for the first time, LinkedIn Sales Navigator tries to find a right match based on the contact details.

Here's a screen shot of a sample LinkedIn profile of a contact when a right match is found.



If the exact profile isn't found, LinkedIn shows possible matches, allowing you to choose the right profile. Here's a screenshot of LinkedIn Sales Navigator that has fetched several similar profiles when an exact match isn't found.



Here are the tasks you can do with the LinkedIn Sales Navigator:

Task	Description
View Profile	View the complete LinkedIn profile details of an account, contact, or lead.
Connect	Request to connect on LinkedIn by sending an invite.
Send Message or Send InMail	Send messages to first-level connections. Alternatively, use an InMail to connect with contacts or leads at other levels.
Icebreakers	Explore common interests and conversation starters with the selected account, contact, or lead.
Get Introduced	Request an introduction through a mutual connection.
Match Profile	Associate an accurate profile when LinkedIn suggests multiple profiles that match with an account, contact or lead. Once associated, you can see the matched LinkedIn profile in your account, contact, or lead records.
Not this person	Use this option if LinkedIn displays profiles that don't belong to the selected account, contact, or lead.

Related Topics

- [Overview of LinkedIn Sales Navigator](#)
- [Overview of LinkedIn Sales Navigator Integration Setup](#)

The Related Objects of Contacts

See contact-related details in the panels view.

Activities

- The Activities panel shows pending and overdue tasks and scheduled appointments. The panel shows completed interactions, such as calls made and emails sent, along with the time stamp.
- To see the complete list of activities, click **View All Activities**.

Opportunities

- Opportunities are sorted by the Open or Closed status. Open opportunities are sorted by the closed date and closed opportunities are sorted by won, lost, and actual closed date.
- To see the complete list of opportunities, click **View All Opportunities**.

Leads

- Leads are sorted by open, converted or retired, and creation date. You can also see the related leads and navigate to the details.
- To see the complete list of leads, click **View All Leads**.

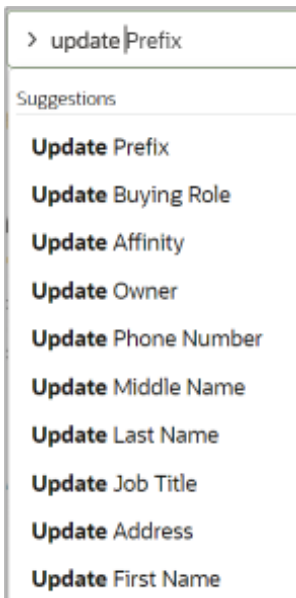
Service Requests

- Service requests are sorted by the Open and Closed status, by severity, and then by last updated date. You can see related service requests and navigate to the details.
- To see the complete list of service requests, click **View All Service Requests**.

Contact Updates

Use the Action Bar to update a single detail of a contact, such as the phone or email.

Here are some of the contact update options:



The image shows a dropdown menu with the text '> update' followed by a cursor and the word 'Prefix'. Below this is a section titled 'Suggestions' which contains a list of update options:

- Update Prefix
- Update Buying Role
- Update Affinity
- Update Owner
- Update Phone Number
- Update Middle Name
- Update Last Name
- Update Job Title
- Update Address
- Update First Name

If you have changes to the basic information of a contact, go to the Contact Properties page by clicking **Contact Details**. Make the changes and save.

The Action Bar Functions on a Contact

Use the Action Bar to see the attachments and team.

You can perform all the **Create**, **Update**, **Show**, and **Add** actions relevant to a contact using the Action Bar. For example, use the Action Bar to create an opportunity, update a buying role, or show the leads.

See the *Assistant* in the The Basics chapter for more information.

Campaigns for Your Contacts

If you're part of the marketing campaigns team, you can see the campaigns that were sent to your contacts.

You can also add more campaigns for them from the Contacts work area.

Privileges to View and Add Campaigns

You need to have the following privileges to view and add campaigns for your contacts:

- The View Marketing Integration Campaigns privilege to see the Campaigns panel and the Show Campaigns option in the Action Bar.
- The Manage Marketing Integration Campaign Members privilege to add campaigns for contacts.

Talk to your administrator to get the privileges.

The Campaigns Panel

The Campaigns panel is available in a contact's foldout view.

The Campaigns panel shows four recent campaigns rolled out to a contact. The most recent one is at the top of the list. The panel shows: Status, Type, Start Date, and End Date of the recent campaigns.

Click **View all Campaigns** to see the campaigns that have been sent to a contact so far.

Campaign-Related Actions from the Action Bar

- **Show Campaigns:** In the Action Bar of a contact's foldout view, type in **Show Campaigns** to see the campaigns sent to the contact.
- **Delete Campaigns:** If you want to discontinue a campaign for a contact, you can remove it by selecting the **Delete** option from **Actions**.
- **Add Campaigns:** To add campaigns for a contact, type in **Add Campaign** in the Action Bar. On the Add Campaign page, search for a campaign using the search list. You can see a list of active campaigns with the details such as Type and Status. Select a campaign and click **Add**.

Email Addresses and Phone Numbers

Contact Preferences for Calling and Email

You can record contact preferences for your customers while editing contact and account information. Your entries can help you meet the requirements of data protection regulations. For example, the European Community's General Data Protection Regulation (GDPR) require marketers to obtain permission from contacts before they can call or email.

There are three possible preference settings for each number and email address:

- Calling preferences:
 - **None:** You don't know the preference for the number. This is the default.
 - **Do Not Call:** The contact doesn't want to be called at the number.
 - **Ok to Call:** The contact gave permission to call at the number.
- Email preferences:
 - **None:** You don't know the preference for the email address. This is the default.
 - **Do Not Email:** The contact doesn't want to receive email at the email address.
 - **Ok to Email:** The contact gave permission to receive email at the email address.

Known preferences show up as icons next to phone numbers and email addresses. No icon means that the preference is unknown.

On pages where click-to-dial and click-to-email are enabled, you can always dial and email when the preference is unknown or **Ok to Email** and **Ok to Call**.

The Do Not Email and Do Not Call items render as plain text and the click-to-email and the click-to-dial actions are disabled. However, you can still call and email by entering "call" and "send" in the Action Bar in a contact.

Here's a screenshot of the list you get for all contacts on an account to help you recognize the icons:

Callout Number	Description
1	Ok to call phone number. Click to dial.
2	Do not call phone number. Click-to-dial is disabled.
3	Phone number where contact preference is unknown. You can click to dial.
4	Ok to email. Click to compose an email.
5	Do not email. Click-to-email is disabled.
6	Email address where contact preference is unknown. You can click to compose an email.

Go to Overview

Name ↕	Title ↕	Phone ↕	Email ↕
Shannon Guthrie	VP	1 +1 (214) 344-1152 📞	shannon.guthrie@audobon.com 4 ✉
Ben Simmons	Director	2 +1 (214) 344-1971 📞	ben.simmons@audobon.com 5 ✉
Aden Aguilar	Director		aaguilar@audubon.org 6
Isaak Butler	IT		ibutler@audubon.org
Stanley Newman	IT	3 +1 (220) 311-2314	stanley.newman@audubon.org

Related Topics

- [Get a List of Contacts That Are OK or Not OK to Call or Email](#)
- [Where can I see that a contact is OK or not OK to call and email?](#)
- [How can I find out which phone numbers for a contact are OK to call?](#)

Get a List of Contacts That Are OK or Not OK to Call or Email

Here's how to get a list of contacts by their contact preferences:

1. Navigate to the Contacts work area.
2. Select an appropriate saved search. **All Contacts** gives you the broadest possible search.
3. In the Action Bar, enter **Do Not** to display all of the Do Not filters.
4. Select one of the filters, for example **Primary Phone: Do Not Call**.
5. Select **Equals**.
6. Select one of the values:
 - **True**: to display a list of all contacts that don't want to be called on the primary phone number.
 - **False**: to display a list of all contacts that are either OK to call or haven't expressed a preference.

Where can I see that a contact is OK or not OK to call and email?

You can see the contact preferences for each phone number and email address in many places that display email addresses and phone numbers:

- On the contact record itself, the contact preferences for the mobile phone, the work phone, and email address are visible on the contact summary (callout 1 in the screenshot) and on the Contact Details page where you set them.

- To see the preferences for all phone numbers of a contact (callout 2), enter **Show Phone Numbers** in the Action Bar.

John Smith: Phone

Contact Details

Account
Pinnacle Technologies (SEATTLE, US)

1

Work Phone
+1 (422) 432-4234

Mobile Phone
+1 (650) 996-5555

Email
test@oracle.com

> Try Show Phone Numbers.

[Go to Overview](#)

Type	Phone	2	Primary	Do not contact	OK to Contact	Don't Contact Reason	Actions
Mobile	+971 (08) 899-9867	No	No	No	...		
Mobile	+1 (650) 996-5555	Yes	No	Yes	...		
Work	+1 (422) 432-4234	No	Yes	No	...		

- On leads, you can view the contact preferences for the primary contact listed at the top of the record overview pages, on the Contacts panel, and in the list of all contacts.

Here's a screen shot of a lead overview page:

- Contact preferences for the primary contact (callout 1)
- Contact preferences for the contacts listed in the Contacts panel (callout 2)
- Link to the page displaying all contacts and their preferences (callout 3)

The screenshot displays the 'HQ renovation' lead overview page. At the top, a header bar shows the lead name 'HQ renovation' and a 'Lead Details' button. Below this, a summary section includes a 'Unique' status badge, the 'Primary Contact' John Smith, the 'Account Name' Pinnacle Technologies (SEATTLE, US), and the 'Rank' Warm. A red box labeled '1' highlights the 'Contact Email' (test@oracle.com) and 'Contact Phone' (+1 (422) 432-4234) fields. Below the summary is a button labeled 'Try Create Appointment.' The main content area is divided into two panels. The 'Activities' panel on the left shows a 'Pending' section and a 'Recent' section with a 'Sales Lead Created' activity by Matt Hooper on 19/04/22 at 9:48 PM, and a 'View All Activities' link. The 'Contacts' panel on the right shows a list of contacts. A red box labeled '2' highlights the contact details for John Smith, including his initials 'JS', name, phone number, email, and 'Primary' status. Below him is Hideo Tanaka, CEO, with his initials 'HT', name, phone number, and email. At the bottom of the 'Contacts' panel is a 'View All Contacts (2)' link, which is highlighted by a red box labeled '3'.

- For accounts, contact preferences are displayed next to the contacts in the Contacts panel (callout 1 in the screenshot) and in the page listing accounts when you click **View All Contacts** (callout 2).

Pinnacle Technologies Account Details

Industry: Aerospace & Defense | Address: 600 4th Ave Rm 107, SEATTLE, WA 98104-1850, UNITED STATES | Website: <http://www.oracle.com> | Owner: Gabrielle Lee

> Try Add Email Address.

Hierarchy

OBIA AtanTour > Pinnacle Technologies

Total Accounts: 8

Parent Account: OBIA AtanTour
44, Terru Str., STAMBUL, 2890FF, TURKEY
Child Accounts: 7

[View Account Hierarchy](#)

Contacts 1

- JS** John Smith
test@oracle.com | +1 (422) 432-4234 | Primary
- HT** Hideo Tanaka
CEO
test23@oracle.com | +1 (123) 456-7890

[View All Contacts \(11\)](#) 2

- On opportunities, you can see the contact preferences in the Contacts panel (callout 1 in the screenshot) and in the list of all contacts that you can display by clicking **View All Contacts** (callout 2).

FINN_FOO_001 Opportunity Details

01 - Qualification | Status: Open | Win Probability: 0 | Close Date: 13/08/14 | Account: Pinnacle Technologies | Owner: Harper Finn

> What would you like to do?

Activities

Pending

Recent

- Opportunity Updated**
By Matt Hooper
Primary Contact Updated to Grace Baker
19/04/22 11:59 PM

[View All Activities](#)

Contacts 1

- GB** Grace Baker
+1 (666) 222-1212 | sendmail-test-discard@oracle.com | Primary
- JB** Joshua Baker
sendmail-test-discard@oracle.com

[View All Contacts \(2\)](#) 2

Produ

[View All P](#)

Related Topics

- [Get a List of Contacts That Are OK or Not OK to Call or Email](#)
- [Get a List of All Phone Numbers, Email Addresses, and Street Addresses](#)

How can I find out which phone numbers for a contact are OK to call?

Display the contact record and enter **Show Phone Numbers** in the Action Bar.

Icons indicate if it's OK to call a number or not:

- **No icon:** Preference is unknown. This is the default.
- **Do Not Call icon:** The contact doesn't want to be called at the number.
- **OK to Call icon:** The contact gave permission to call at the number.

The same information is provided by two columns that you can use to sort the list:

- **Do Not Contact**
- **OK to Contact**

Related Topics

- [Get a List of Contacts That Are OK or Not OK to Call or Email](#)

Phones, Email Addresses, and Street Addresses

You can enter multiple phone numbers, multiple email addresses, and multiple street addresses for each contact and account.

- When you're creating an account, you can enter one phone number and one street address, but no emails.
- When creating a contact, you can enter a work number, a mobile number, and one email address. You can enter one street address for the contact or use the address of the account associated with the contact.
- After the account or contact is created, enter you can enter additional phone numbers, email addresses, and street addresses, using the Action Bar. Just enter: **Add Phone Number**, **Add Email Address** or **Add Address**.
- To update, enter either **Update Phone Numbers** or **Update Email Addresses**.
- You can display all entries from the Action Bar using the Show command. Just enter **Show Addresses**, **Show Phone Numbers**, and so on.

Primary Phones, Primary Emails, and Primary Addresses

Although you can enter multiple phone numbers, multiple email addresses, and multiple street addresses for each contact and account, it's the ones specified as primary that are the most important.

It's the primary number, the primary email, and the primary street address that shows up in Oracle-provided saved searches and in information summaries, for example.

And when you use the Action Bar to call a phone number or a send an email, you're always calling the primary number and emailing the primary email address.

As a rule, the first phone number, email address, and street address you enter for a contact or account automatically becomes primary.

If you enter both the work phone and mobile phone numbers for a contact when creating a contact, the work phone becomes the primary phone.

When you use one of the Add actions in the Action Bar, you can specify the phone number, email, or street address you're adding as the new primary.

You can always get a list of all the phones, email addresses, and street addresses to find out which of them is primary using the Show command in the Action Bar. You can then specify another one as primary.

Related Topics

- [Specify Which Phone, Email, and Street Address is Primary](#)

Specify Which Phone, Email, and Street Address is Primary

Here's how to specify which of the phone numbers, email addresses, or street addresses is primary.

1. Open the record.
2. Enter **Show** in the Action Bar and select what you want to see: **Show Phone Numbers**, **Show Email Addresses**, or **Show Addresses**.
3. Press **Return**.

The application displays the list.

Here's a screenshot of a list of phone numbers for a contact. You can tell which is primary by a **Yes** in the **Primary** column (callout 1 in the screenshot).

My Contacts Next: Auto_ESCampaign_Contact_FNa01 LName01

Alex Johnson: Phone Contact Details

Account **Johnson Household** Work Phone +1 (415) 555-1212 ✕ Mobile Phone +1 (415) 555-2222 Email aj@oracle.com

> Try searching for an action

Go to Overview	1					
Phone	Primary ⌵	Type ⌵	Do Not Contact ⌵	OK to Contact ⌵	Actions	2
+1 (415) 555-2222	No	Mobile	No	No	...	
+1 (415) 555-1212 ✕	Yes	Work	Yes	No	...	

4. Click **Actions** (the three dots highlighted by callout 2) for the number you want to make primary and select **Edit**.
5. On the Edit Phone page, click **Primary**.
6. Click **Save**.

Get a List of All Phone Numbers, Email Addresses, and Street Addresses

Most pages and lists display only the primary ways of contacting the person or account you're trying to reach. Here's how to get a list of all phone numbers, email addresses, and street addresses for an account or contact:

1. Open the record.
2. Enter **show** in the **Action Bar** and select what you want to see: **Show Phone Numbers**, **Show Email Addresses**, or **Show Addresses**.
3. Press **Return**.

Results:

The application displays the list.

Add a Phone Number, Email Address, or Street Address to Accounts and Contacts

Here's how to add a phone number, an email address, or a street address to a contact or an account.

1. Open the record.
2. Enter **Add** in the **Action Bar** and select what you want to add: **Add Phone Number**, **Add Email Address**, or **Add Address**.
3. Enter the new information and indicate if you want it to be primary.
4. If you're adding a phone number or email address, you can specify the contact preference by selecting one of the options:
 - **None**: preference is unknown.
 - **Do Not Email** or **Do Not Call**: the contact or organization doesn't want to be contacted using this phone number or email address.
 - **OK to Email** or **OK to Call**: the contact or organization gives consent to being contacted.
5. Click **Save**.

Results:

Depending on what you entered, the application displays a list of all phone numbers, email addresses, or street addresses. You can edit them. After you add a phone number or email address, the application automatically checks if your entry is valid. If the phone number won't dial or the email isn't valid, you get notified right under the entry.

Related Topics

- [Verify Phone and Email](#)

Update Phone Numbers, Email Addresses, and Contact Preferences

Here's how to update phone numbers and email addresses, including contact preferences.

1. Display the contact you want to update.
2. To update the contact's primary phone number or primary email address, including the contact preference, do the following:
 - a. In the Action Bar, enter **Update Phone Number** or **Update Email**.
 - b. Make your updates and click **Save**.
3. If you want to update any of the phones or email addresses for a contact: then do the following:
 - a. In the Action Bar, enter **Show Phone Numbers** or **Show Email Addresses**.
 - b. Click **Actions > Edit** for the phone number or email address you want to update.
 - c. Make your updates and click **Save**.

7 Rollups

What are rollups?

Rollups summarize data. For example, a rollup can calculate the sum of the potential revenue from the opportunities for an account hierarchy.

Rollup calculations appear on top of the panels. This screenshot shows Opportunities and Service Requests rollups:

The New Walt Disney Company

Industry Amusement Parks and Arcades Address 500 S Buena Vista St,Burbank, CA Website <http://www.thewaltdisneycompany.com> Owner Alicia Wu Hierarchy Number of Open Activities 4

> Try searching for an action

Opportunities	Leads	Service Requests	Assets
Open Opportunities \$100,000 Hierarchy Open Opportunity Revenue 146,000 Q4FY22 Oracle HCM \$ 40,000 04 - Presentation 12/5/21 Q3FY22 Oracle ERP \$ 30,000 02 - Opportunity 10/5/21 Q1FY22 Oracle Autonomous Database \$ 20,000 04 - Presentation 12/30/21 Q2FY22 Oracle B2B Sales and Service \$ 10,000 03 - Building Vision 10/5/21	Disney - Sentinel Power Server 3000 Susan Wan +1 (415) 434-1001 susan.wan@disney.com Walt Disney - Ultra Power Server 4000 Susan Wan +1 (415) 434-1001 susan.wan@disney.com	Open Critical Service Requests 1 Open Service Requests 3 Hierarchy Number of Open Service Requests 5 Cannot login to manage subscription SR0000030012 Resolved Lucy Wan Last Updated Date: 11/30/21 10:52 PM 401 Error when accessing Express module SR0000030014 New Ed Stolz Last Updated Date: 9/22/21 7:04 AM Error when creating user and roles SR0000030013 New Steve Morse Last Updated Date: 9/22/21 6:44 AM	

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

Search Using Hierarchy Rollups

You can search for accounts using any of the information that's rolled up in their hierarchies.

For example, you can search for all accounts in account hierarchies where the total number of open leads in their hierarchy is 1,000 or more.

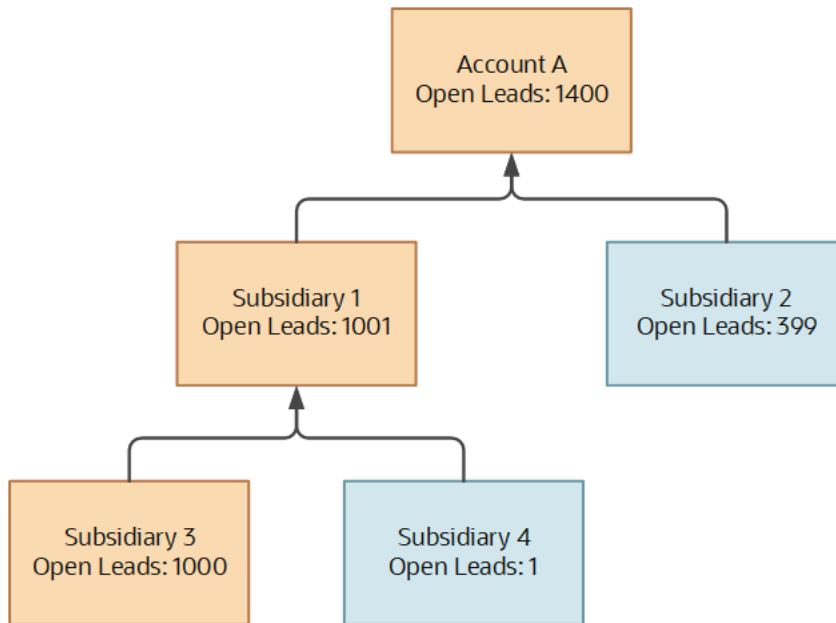
Let's assume that the hierarchy of account A contains 4 subsidiaries. The number of open leads of Account A and each account is the sum of the open leads of its subsidiaries plus its own open leads.

	Number of Open Leads from the Hierarchy	Parent
Account A	1,400 (total from Subsidiary 1 and 2)	Top of the hierarchy
Subsidiary 1	1,001 (total from Subsidiary 3 and 4)	Account A
Subsidiary 2	399	Account A
Subsidiary 3	1,000	Subsidiary 1
Subsidiary 4	1	Subsidiary 1

If you search for accounts with open leads of more than 1,000, your search returns these accounts:

- Account A
- Subsidiary 1
- Subsidiary 3

Here's a graphic showing the hierarchy of an account. The accounts that show up in search are indicated in orange boxes:



Here's how you search based on the hierarchy data:

1. In the Accounts landing page search field, type **Account Rollup**.

You get a list of hierarchy rollup attributes. Hierarchy rollup attributes are all prefixed with the word, **Hierarchy**.

2. Select a rollup. For example, select **Hierarchy Number of Open Leads**.
3. Select an operator, such as **Greater Than or Equal to**.

The operators vary based on the rollup you select.

4. Enter a value. For example, 1000.

You get the list of accounts that match the criteria. Click an account name to go to its foldout view.

Note: You can also use account rollups that don't include hierarchy calculations, to search for accounts. The rollups appear in the format: Account Rollups: <rollup attribute name>, such as Account Rollups: Total Number of Employees.

Search for Contacts Using Rollups

Search for contacts using the contacts rollups. For example, you can search for contacts whose last response date is updated.

Here's how you search:

1. In the Contacts landing page search field, type **Contact Rollup**. You get a list of contact rollups you can search by, for example, Calls Made, Critical Open Service Requests, or Hot Leads.
2. Select a rollup. For example, select **Last Response Date**.
3. Select an operator. The operators vary based on the rollup you select. For example, select **Last 3 Months, In The Future**, or **First Month Of This Quarter**.

If you want to see all the available operator options, select **Show More**.

4. For example, if you select the **Has a Value** operator, you get the list of contacts that match the criteria.
5. Click the contact name to go to its foldout view.

If you want to see the account details, click the account name.

Group Your Accounts and Contacts List by Rollup Values

Use rollups as criteria to group your accounts and contacts lists.

When your administrator enables rollups for grouping your search results, they appear in the Group By drop-down menu on the Accounts or Contacts list views.

To group accounts or contacts by rollups, select a rollout from the Group By drop-down list.

For example, select the hierarchy number of open opportunities rollout. This rollout organizes the Accounts list based on the number of open opportunities in an account hierarchy.

The accounts are arranged in the number buckets defined by your administrator when setting up the filter groups for the rollout.

Here's a screenshot that shows four account hierarchies with 5 to 30 open opportunities and two accounts that have more than 30 opportunities.

My Accounts

Record Set In I am on the team or territory

Try searching by keyword or add a filter

Results 2,477

Group By Account Rollup: Hierarchy

Name	Primary Address	Primary Contact	Primary Industry	Actions
5 - <30 Results 4				
OBIA New Enterprise (ARNIS, DE)			High Technology	...
OBIA New Healthcare (LURUP, DE)			Professional Services	...
OBIA New Industries (ARNIS, DE)			Professional Services	...
OBIA New Technologies (ARNIS, DE)			High Technology	...
>= 30 Results 2				
OBIA AtanTour (STAMBUL, TR)	44, Terru Str.,STAMBUL 2890FF,TURKEY			...

8 Quotes and Quote Lines

Quotes

Quotes

The Quotes work area gives you a view of the open opportunity quotes created in the last 30 days. You can connect to Oracle Configure, Price, and Quote (Oracle CPQ) and see the quote details right from the work area.

From Quotes:

- See the quotes you can access.
- See the quotes list and high-level details.

Quotes You Can Access

The Quotes landing page shows the list of your active quotes.

Switch to the Saved Searches of Quotes

You have saved searches that show the quotes based on different criteria. Here's the list of all them:

Saved Search	Quotes you get
All Opportunities Active Quotes	Shows the active quotes created in the last 30 days from all the open opportunities you can access.
My Opportunities Active Quotes	Default view. Shows the active quotes created in the last 30 days from the open opportunities you own.
All Opportunities Expired Quotes	Shows the expired, active, and inactive quotes created in the last 30 days from the open opportunities you can access.
My Expired Quotes	Shows the expired, active, and inactive quotes created in the last 30 days from the open opportunities you own.

Use the Action Bar to switch your view to the other saved searches.

You can create your own saved searches as well. See [Saved Searches](#) in the The Basics chapter to learn more.

The Quotes List and High-Level Details

The quotes list shows the name and the status of a quote, the opportunity it belongs to, the account the opportunity is associated with, the validity date, and total contract value.

From the list view you can navigate to:

- The quote details in Oracle CPQ - the quoting application.
- The opportunity related to the quote.
- The account related to the quote.

Quote Details in Oracle CPQ

Click a quote in the list to see the details in Oracle CPQ. In the quote details page:

- Review the transaction details.
- Specify pricing.
- Streamline the approvals.
- Generate a proposal.

See the View Quote Details in Oracle CPQ topic under the Quotes in the opportunity Work Area section to learn more.

The Opportunity Details

Click the opportunity name to go to the Opportunity foldout view.

See the Quotes in the Opportunity work area topic to learn more about all the actions you can do from the Opportunity work area.

The Account Details

Click the account name to go to the Account foldout view. In the Quotes & Orders panel of the Account foldout view.

Quotes in the Opportunity Work Area

Quotes in the Opportunity Work Area

Go to the opportunity work area and select an opportunity.

The Opportunity foldout view shows two panels related to quotes:

- Quotes and Orders
- Products

The screenshot displays the Oracle CPQ Opportunity Work Area for opportunity CPQ1509977709. The interface includes a header with the opportunity name, a search bar, and a navigation menu. The main content area is divided into four panels: Activities, Contacts, Products, and Quotes and Orders. The Quotes and Orders panel is highlighted with a red circle and a '1' in the top right corner. It shows a list of quotes with columns for quote number, amount, and last updated date. The first quote is 11/24 CPQ1509977709 with an amount of \$32,500 and last updated on 24-Nov-2021. The second quote is 11/25 CPQ1509977709 with an amount of \$0 and last updated on 25-Nov-2021. The Products panel is highlighted with a red circle and a '4' in the top right corner. It shows the opportunity amount of \$32,500 and a list of products, including Pell DS 730 with an amount of \$32,500. The Activities panel shows a list of recent activities, including 'Gabrielle Lee Updated Opportunity' and 'Gabrielle Lee Created Opportunity'. The Contacts panel shows a list of contacts, including 'Gabrielle Lee'.

The Quotes and Orders Panel

The Quotes and Orders panel (callout 1) shows active quotes (callout 2) followed by inactive quotes, ordered by the last updated date. You can see the contract value and the last updated date for the quotes.

The View all Quotes link (callout 3) in the panel takes you to the quotes list page.

The Products Panel

If your quotes have products, they appear in the Products panel (callout 4).

View All the Quotes of an Opportunity

You can see all the quotes of an opportunity from the Opportunity foldout view.

Click **View All Quotes** in the Quotes and Orders panel or search and select **Show Quotes** from the Action Bar on the Opportunity foldout view.

You see the quotes created up to the current date. The active quote is on top of the quotes list, followed by the inactive quotes, ordered by the last updated date.

CPQ1509977709: Quotes and Orders

Opportunity Details

11 - Qualification Status Open Win Probability 0 Close Date 14-Dec-2021 Owner Gabrielle Lee

> Try searching for an action

Name	Version	Proposal	Status	Last Updated	Total Contract Value	Active	Actions
11/24 CPQ1509977709	1		Created	24-Nov-2021	\$ 32,500	Yes	...
11/25 CPQ1509977709	1		Created	25-Nov-2021	\$ 0	No	... Make Active Duplicate Create Version

Here are the things you can do from the opportunity quotes list page:

- Create a quote.
- View the quote details in Oracle CPQ (callout 1).
- Download the proposal related to a quote (callout 2).
- Manage actions on a quote (callout 3):
 - Make a quote active.
 - Create a copy of a quote.
 - Create a version of a quote.

Create a Quote

1. Navigate to **Digital Sales > Opportunities**.

2. On the opportunities list page, use the Action Bar to search and select **Create Quote**.

The Oracle CPQ page for creating new quote appears.

3. Enter transaction details.
4. Enter product details.
5. Enter customer details.
6. Enter pricing details.
7. Save your quote.

View the Quote Details in Oracle CPQ

Click the quote name in the list view to see the quote details saved in Oracle CPQ. Digital Sales and Oracle CPQ are integrated. So, the changes you make to the quotes using any of these applications reflect in the other.

In the quote details page:

- Review the transaction details.
- Specify pricing.
- Complete approvals.
- Generate a proposal.

Grp Seq No	Product #	Description	List Price	Qty	Periodicity	Contract Periods	Discount	Discount Type	Custom Disco...	Net Price	Price Score	Net Amount
1.0	SUV		\$0.00	1					\$0.00	\$0.00		\$0.00
1.1	Crossover SUV Subscrip	Crossover SUV Subscription	\$30,000.00	1	Per Month	1			\$0.00	\$30,000.00	1	\$30,000.00
1.2	Premium Maintenance Pl	Premium Maintenance Plan	\$2,500.00	1	Per Month	1			\$0.00	\$2,500.00	1	\$2,500.00

Transaction Details

In the **Transaction Details** tab (callout 1), update the details such as the quote status, win-or-loss status, owner, and customer contact. You can upload a document related to the quote.

If you're quoting for products, you can add, remove, or reconfigure them based on the changes your customer has requested.

In the **Customer Info** tab, update the customer information.

Pricing

Specify the pricing and discounts. Perform automated pricing calculations.

You can update the transaction details, products, customer info, pricing, or approvals and cascade the changes to the opportunity in the sales application using **Update Sales** (callout 2). For example, if you have changed the quote name save your changes and click **Update Sales**. The name change reflects on all the pages of opportunity.

Approvals

Send the quote for approval. After that, share it with the customer and take the deal to closure.

Generate Proposal

When you're ready, generate a business proposal based on this quote, using **Generate Proposal** (callout 3) on the quote details page.

Download The Proposal

If you have generated a proposal for a quote you can find a download icon below **Proposal** column in the list, highlighted in the screenshot here.

CPQ1509977709: Quotes and Orders

01 - Qualification
Status Open
Win Probability 0
Close Date 14-Dec-2021
Owner Gabrielle Lee

> Try searching for an action

Go to Overview

Name	Version	Proposal	Status	Last Updated
11/24 CPQ1509977709	1		Created	24-Nov-2021
11/25 CPQ1509977709	1		Created	25-Nov-2021

In a new tab, a file explorer window appears, prompting you to save the pdf file of your proposal to your preferred location on your computer. Save the pdf and share it with the customer.

Manage Actions on a Quote

The table here lists out the actions available for quotes.

Actions	Description
Make Active	This option is available for inactive quotes. Only one quote can be active at a time. When you change an inactive quote to active, the existing active quote is deactivated. Note: Ensure that you enable the ORA_MOO_REVN_RECONCILE_FROM_SO profile option to reconcile the revenue lines with the new quote lines.

Duplicate	Select this option to create a copy of a quote. Change the quote name and save.
Create Version	Select this option to make changes to a quote and save it as a new version.

Quote Lines

Quote Lines You Can Access

The Quote Lines work area gives you a view of the products associated with quotes created in the last 30 days. A quote line is made up of the products in a quote, the opportunity details, the sales order, and all the other relevant information.

The Quote Lines landing page shows the list of quote lines associated with the active quotes you own. You can switch your view to other saved searches for Quote Lines. Here's a table listing out the saved searches:

Saved Search	Quotes You Get
My Opportunities Active Quote Lines	Shows the active quote lines from the quotes created in the last 30 days from the opportunities you own.
All Active Quote Lines	Shows the active quote lines from the quotes created in the last 30 days from all the opportunities.
All Quote Lines	Shows the quote lines from all the quotes created in the last 30 days that you have access to.

You can create your own saved searches as well. See [Saved Searches](#) in the The Basics chapter to learn more.

The Quote Lines List and High-Level Details

The quote lines list shows you the product name, the link to the opportunity, the link to the quote, the quote status, the product request date, and the contract value of the product.

From the list view you can navigate to:

- The opportunity related to the quote
- The quote details in Oracle CPQ, the quoting application

The Opportunity Details

Click the opportunity name to go to the Opportunity foldout view.

See the Quotes in the Opportunity work area section to learn more about all the actions you can do from the Opportunity work area.

The Quote Details in Oracle CPQ

Click a quote in the list to see the details in Oracle CPQ. In the quote details page:

- Review the transaction details.
- Specify pricing.
- Streamline the approvals.

- Generate a proposal.

9 Appointments and Tasks

Overview of Appointments and Tasks

You can create tasks and appointments related to individual accounts, contacts, leads, and opportunities. And you can create stand-alone tasks and appointments. Collectively called "activities", tasks and appointments can be in-person meetings, web conferences, calls, demonstrations, events, and so on. Key difference is that tasks have a due date and a completion status, while appointments are scheduled for specific dates and times. You assign tasks to sales organization resources to carry out. You can schedule appointments with both internal resources and contacts.

Here are a few things you should know:

- You can create and manage tasks and appointments from the Activities work area or in the context of an individual account, contact, lead, or opportunity.
- Your pending and overdue tasks are also visible and accessible in the Sales Dashboard.
- Tasks and appointments are listed in activities for all associated records. For example, if you create an appointment for a contact from an account, then that task is visible in both the account list of activities and contact list of activities.
- If you create a task or appointment in a record, it automatically shows up in the list of activities for that record. For example, if you create a task from a lead, it shows up in the Activities list for that lead. If you create the same task from the Activities work area, you must manually associate the lead to the task yourself.
- You can edit the appointment or task from any record where it's visible or from the Activities work area. Editing it in one place is the same as editing it in another.
- While editing an appointment or task, you can attach documents.
- If you want to create a stand-alone task or appointment for yourself and your team without associating it to any record, create it from the home page or from the Activities work area.
- Stand-alone tasks and appointments are visible only in the Activities work area and in the Sales Dashboard. Only you and other resources you added can see them.
- All salespeople who can access a record, can view the tasks and appointments you associate to that record whether or not you specifically add them as resources. However, only resources you add receive notifications and only the resources and sales administrators can edit the tasks and appointments.
- The salespeople you add as resources, can view appointments and tasks in their My Open Activities list provided by Oracle in the Activities work area.
- The resources you add to a task or appointment get automatically notified using the Notifications (bell icon) feature and email.
- Salespeople added to a task or an appointment can set a reminder before a task is due or before the appointment takes place. Each person can specify if and when they want to be reminded. Reminders come in through the Notifications feature and email.
- You can take actions on a task or an appointment without having to drill into it. For example, you can call a contact on a task by selecting Call. If there's only one contact associated to the task, the call dials directly. If multiple contacts are associated, you can choose which one to call. Notes you take on the call while it's in progress get saved with the task.

Here are a few things to understand about tasks specifically:

- Typically, it's the owner of the task that's responsible for completing the task and setting its status to Complete. Change the due date of an overdue task to the date you complete it to have the completion date reflected in the task.
- If a task is overdue, then all associated resources see that task on their list of overdue tasks in the Activities work area and in the Sales Dashboard. Your sales administrator can change this default, of course, to just show overdue tasks to the task owner, for example.
- When you create a task, you become its owner automatically. However, you can create a task for someone else by adding a resource and then switching task ownership to that resource. See the topic [Reassign Task Ownership to Someone Else](#).

And a few specifics about appointments:

- You can create an appointment for multiple contacts at the same time and invite multiple resources. Each person you add to the appointment is notified. Customer contacts receive automatic email notifications. The salespeople you add as resources to the appointment get invited both through the Notifications feature (the bell icon) and by email.
- Resources can accept or decline the invitation from the appointment itself. Their responses show up next to their names in the appointment.
- There's no group calendar for appointments. Your organization must keep a separate group calendar so you know who is available when you create an appointment. Appointments in Digital Sales aren't synchronized automatically with Outlook calendars or other calendars.

Review and Edit Tasks and Appointments in the Activities Work Area

Use the Activities work area to review all of the appointments and tasks you own and where you are listed as a resource. For example, you can review which tasks and appointments are due today or what activities are scheduled for a particular account. You can edit a task or an appointment directly from the list of activities or in the context of any of the records the task or appointment is associated with.

Here's how to review your list of appointments and tasks:

1. Click **Activities** on the home page.
2. In the Activities landing page, click in the search field and select a saved search as your starting point. Oracle provides you with several predefined saved searches:

Saved Search	What You Get
My Activities	All of the appointments and tasks where you are a resource, including closed tasks and past appointments.
My Appointments	All appointments where you are a resource, including past appointments.
My Open Activities	All of future appointments and open tasks where you are a resource. An open task is a task that's not started, in progress, or on hold.

Saved Search	What You Get
My Open Tasks	All open tasks (not started, in progress, or on hold).
My Overdue Tasks	Overdue open tasks where you are listed as a resource.

3. Find the task or appointment in the list generated by the saved search that you selected. You can:
 - o Filter the activity by date and other values. For example, here's how to see activities due today:
 - i. Enter **date** in the search field.
 - ii. Select the **Due Date** filter from the list.
 - iii. Select **Today**.
 - o Search for the activity in the list by keyword. For example, you can enter the name of the account or contact and press **Return**.
 - o Group search results by priority, status, or by contact and other criteria using the **Group By** field.
 - o Change what attributes display in search results: Click **More Actions** (the three dots next to the Group By field) and select **Manage Columns**.
 - o Change the display order of your results using the controls at the top of each column.
4. You can edit appointments and tasks directly from the list by clicking **Action > Edit**.

View a Task or an Appointment in One of the Associated Records

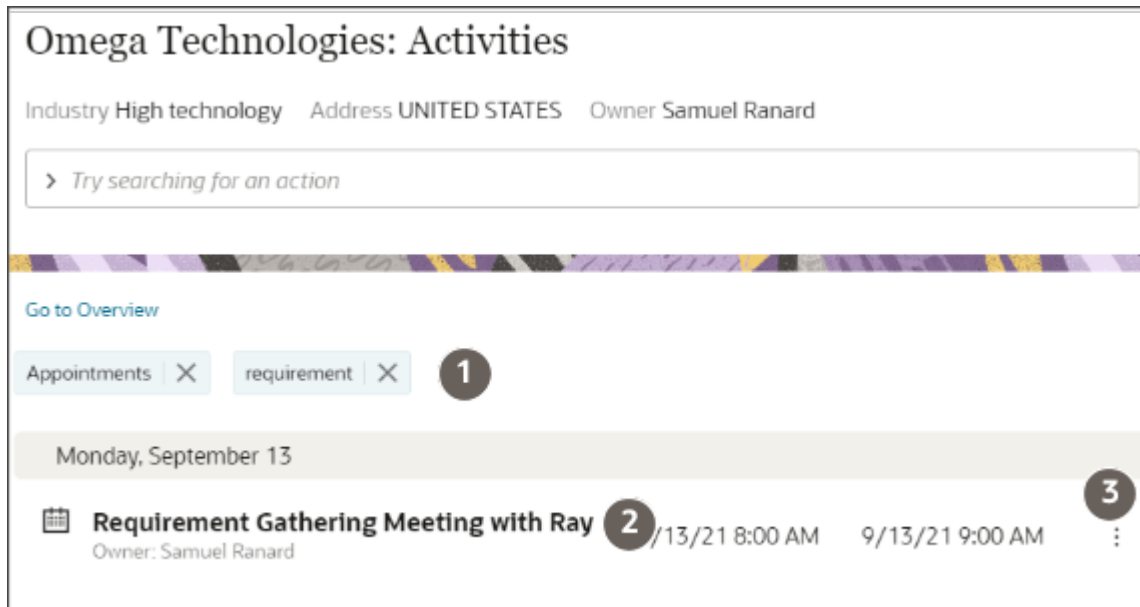
You view tasks and appointments in the list of activities on any of the records they're associated with. If a salesperson creates an appointment for a contact, for example, open the contact Activities page to see the activity. Provided you have access to a record itself, you can view basic information about tasks and activities, even if you aren't added as a resource. Some details are visible only when you're a resource and have edit access, however.

1. Open the record overview and place your cursor in the Action Bar.
2. Enter **Filter** and select either **Filter Appointments** or **Filter Tasks** from the list.

The list of activities displays only the activity type you selected.

3. If you don't see what you're looking for in the list, you can search using a keyword: just enter the keyword in the Action Bar and press **Return**.

Here's a screenshot of what you see in the Activities page after you filter for appointments and search by keyword. Both filters and keywords are listed above the results (callout 1).



4. To view more details on the task or appointment details, click on the name (callout 2).
5. If you're added as a resource in the task or appointment, you can view even more details by selecting **Edit** from the **Actions** list (the three vertical dots highlighted by callout 3). The Actions list isn't visible unless you own the activity or you're added as a resource.

Set an Appointment or a Task Reminder

Here's how you can set a reminder for an upcoming appointment or a due date for a task. You can receive the reminder through the Notifications feature (Bell icon) and by email, depending on what notifications are enabled.

The reminder preference that you set is for yourself only. Each resource on the appointment can set their own reminder.

1. In the Activities work area, edit the appointment by clicking **Actions > Edit**. (The Actions menu is the icon with the three vertical dots).
2. If you're setting the reminder for a stand-alone appointment, do the following:
 - a. Click **Activities** on the home page and open the appointment from there. For details, see the topic *Review and Edit Tasks and Appointments in the Activities Work Area*.
 - b. Click the appointment name link to drill down in to the appointment details.
 - c. Click **Actions > Edit**.
3. Specify when you want to be reminded from the **Set Reminder** list. By default there is no reminder. Each resource can set their own reminder preference.
4. Save.

Sales Recommendations

When your application administrator enables the Sales Recommendation feature, your application analyzes the text of notes and call logs and recommends one or more appropriate follow-up actions. The recommended actions can be either tasks or appointments, depending on the text that was entered. Recommendations appear at the top of the Activities panel and page where you can either accept or dismiss them.

Suppose, for example, that someone on your team enters "asked for a meeting next Tuesday at 11" while wrapping up a call with a contact (callout 1 in the screenshot). Based on the entry, the application suggests that you schedule an appointment (callout 2).

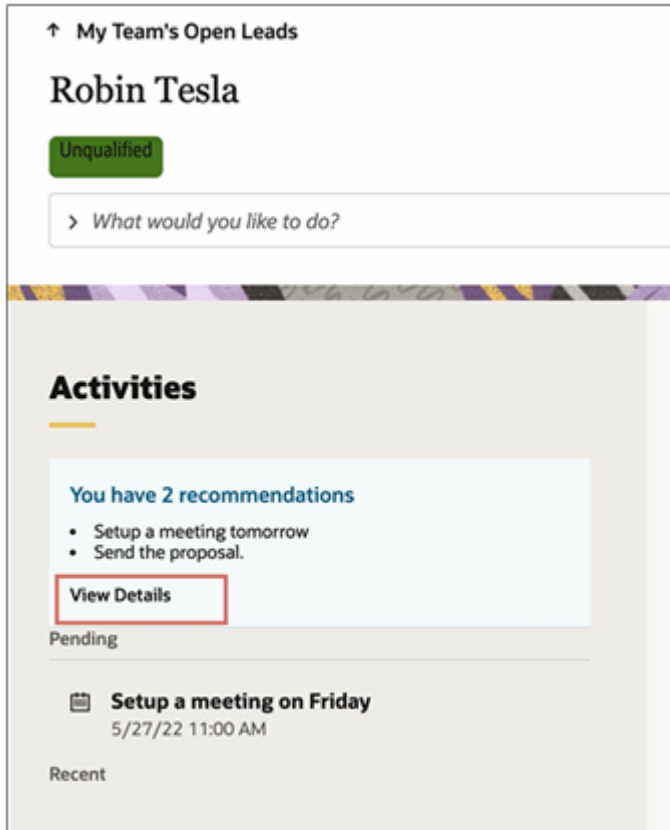
You can either create the appointment or click **Dismiss** to reject the recommendation and remove it from view. If you accept, the application schedules the appointment with the contact at the time specified in the text. The appointment time reflects your time zone and the recommendations copies over the relevant text from the call wrap up.

The screenshot displays the Oracle Fusion Cloud Sales Activities panel. At the top, there is a link "Go to Overview". Below it, a recommendation is shown: "Asked for a meeting next week Tuesday at 11 - discuss spec and features" with a callout "2" and buttons "Create Appointment" and "Dismiss". A "Pending" section follows. Below that is a task "SAT task 001" by "Matt Hooper" with an "Override" button and a due date of "12/29/21". A date separator "Wednesday, January 19" is shown. Below this is a call log entry for "John Miller" with a callout "1", showing an inbound call to "Lisa Jones" with a positive outcome. The call log text reads: "Got a call from John Miller regarding their new requirements for Printers. I provided new printer model details. John asked for a meeting next week Tuesday at 11 am to discuss spec and features". A date range "January 9 - January 15" is shown. At the bottom, a task "Matt Hooper Updated Account" is listed with a timestamp of "1/13/22 10:41 PM".

When enabled, this feature replaces the automatic creation of a task after call wrap ups.

Multiple Recommendations

If you get multiple recommendations, you can review them one by one from the Activities panel or from the Activities pages, by clicking the **View Details** link.



Add and View Attachments for Tasks and Appointments

You can add attachments while creating or editing tasks and appointments. You can see if a task or appointment includes attachments in the page displaying the list of all Activities, by clicking on the task or appointment title. You can download the attachments directly from Activities, but to add or delete attachments you must edit the activity itself.

Remove a Completed Task from the Pending List

Tasks associated to a record remain listed in the Pending activities section of the Activities page, unless you indicate you completed them. For example, if you have a pending overdue task to create a demo for your customer, you must mark the task as complete to remove it from the Pending list. If you want to record task completion on the day you completed it, then you must change its due date to match the day you completed it.

1. For marking the task as complete, there are two options:
 - o Display one of the records the task is associated with and click **All Activities** to open the Activities page and locate the task.
 - o Navigate to the Activities work area and locate the task there.
2. If you want the task listed in Activities on the date you completed it, then: do the following:
 - a. From the **Actions** menu (three vertical dots) on the right side of the page, select **Edit**.

- b. Select the **Complete** status.
 - c. Select today's date as the **Due Date**.
3. To mark the task as complete, without changing the date, select **Mark As Complete** the **Actions** menu on the right side of the page.
4. Click **Save**.

Appointments

Create an Appointment

To save time, create appointments from an account, an opportunity, a lead, or a contact. Creating the appointment from a record you're viewing automatically displays the appointment in the Activities list for that record. When you create the appointment from the Activities work area, you have to link the appropriate record yourself. If you create stand-alone appointments, these are visible only in the Activities work area or the Sales Dashboard for the resources associated to the appointment.

Before you create an appointment, make sure you know when the people you're inviting are available. The appointments in Digital Sales aren't linked to the Outlook calendar or other calendars. Your contacts receive an email invitation for the appointments you create, as long as your administrator has enabled email notifications for appointments. Other salespeople you add as resources to your appointments receive an automatic notification through email and the Notifications (Bell icon) feature.

Create an Appointment from an Account, an Opportunity, a Lead, or a Contact

1. Navigate to the appropriate work area.
2. In the landing page, find the record in the list and select **Create Appointment** from the **Actions** list.
3. While you're viewing an individual record, you can instead enter **create** in the Action Bar and select the **Create Appointment** action from there.
4. Select the appointment type and enter the basic details about the appointment.

Note: Selecting **Web Conference** as the appointment type schedules a Zoom or another type of web conference. For details, see the [Create a Web Conference Appointment](#) topic.
5. You can receive a reminder using the Notifications feature by selecting a time interval in the **Set Reminder** field.
6. In **Appointment Details**, add the contacts and resources you're inviting.

Note: The first contact you add to an appointment is marked as the primary contact. After you add more contacts, you can designate a different contact as the primary contact.
7. You can also:
 - Add attachments by dragging files to **Drag and Drop**, or click the region to select.
 - Set the appointment to show you as busy by making a selection from the **Show Time As** list.
 - Make a selection from the **Response** field to indicate if you accept or decline the appointment. Your response is recorded in the list of resources.
 - See who else is invited and who has responded and how, by checking the **Appointment Details**.
8. Click **Save**.

9. If you want the appointment to be visible in the Activities lists of other related records, then edit the appointment you just created and select them. You can associate an appointment with only one account, one lead, and one opportunity or a combination of these.

Create an Appointment from the Activities Work Area

1. Navigate to the Activities work area.
2. Click in the search field and select **Create Appointment**.
3. Select the appointment type and enter the basic details about the appointment.
Note: Selecting **Web Conference** as the appointment type schedules a Zoom or another type of web conference. For details, see the [Create a Web Conference Appointment](#) topic.
4. You can add one or more of the following to the appointment: an opportunity, a lead, or an account. Adding a record displays the appointment in the list of activities for that record.
5. You can receive a reminder using the Notifications feature by selecting a time interval in the **Set Reminder** field.
6. Click **Appointment Details** and add any additional contacts and resources. The appointment becomes visible in the list of activities for any contact you add.
7. Click **Save**.

Accept or Decline an Invitation to an Appointment

When someone adds you to an appointment as a resource, you get an invitation through the Notifications feature (the Bell icon) and through email. You can accept or decline the invitation from the appointment itself. In the appointment, you can set a reminder for yourself and specify if you want to show your schedule as busy.

You can edit the appointment either from the Activities work area or from the Activities page in one of the records associated with the appointment, such as the contact or the account.

1. Click **Actions > Edit**. (The Actions menu is the icon with the three vertical dots).
2. Make a selection from the **Response** field to indicate if you accept or decline the appointment. Your response is recorded in the list of resources.
3. Specify when you want to be reminded from the **Set Reminder** list. By default there is no reminder. Each resource can set their own reminder preference.
4. You can also:
 - Set the appointment to show you as busy by making a selection from the **Show Time As** list.
 - See who else is invited and who has responded and how, by checking the **Appointment Details**.
5. Save.

Related Topics

- [Review and Edit Tasks and Appointments in the Activities Work Area](#)

Find Out Who Responded to an Appointment Invitation

You can check who accepted and who declined an invitation in the Appointment Details section of the appointment. Here's how.

1. Open the appointment either from the Activities work area or from the Activities page of an associated record.
2. Click **Actions > Edit**.
3. See who else is invited and who has responded and how, by checking list of resources in the **Appointment Details**.

Appointment Details

Contacts

Contact

Primary Contact	Name	Title	Email
★	Alan Greenspan	CTO	greenspanalar

Resources

Resource

Owner	Name	Email	Response	Show Time As
	Eliza Mathew	eliza.mathew@donotreply.com	Not responded	Tentative
★	Bob Flanders	bflanders@noreply.com	Accept	Busy

Cancel

Save

Tasks

Create a Task

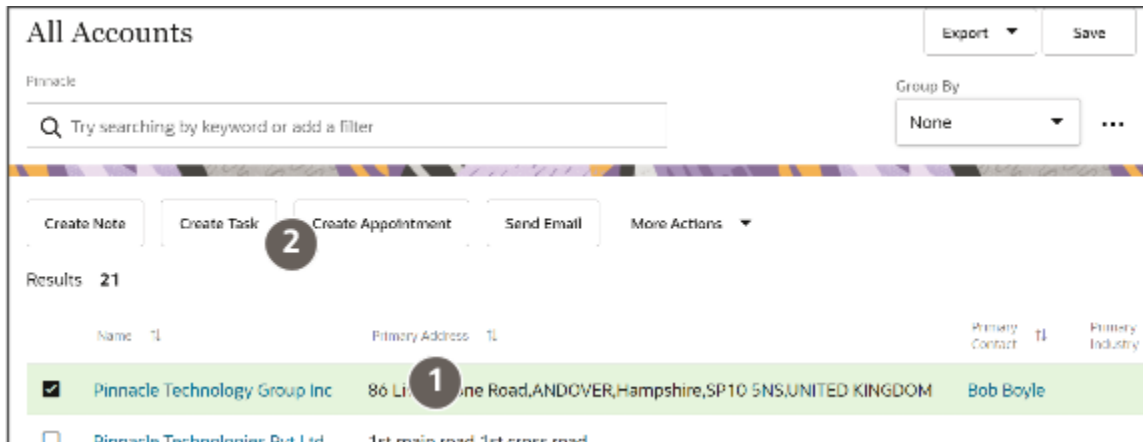
Just as with appointments, you can create tasks from an account, an opportunity, a lead, or a contact you're viewing. Or you can create them from the home page and from the Activities work area.

Creating tasks from a record automatically associates the task with the record where you're creating it. When you create the task in the Activities work area, you can associate it with one or more of the following: an account, an opportunity, a lead, or a contact. The task you create shows up the list of activities for the records you associate. When you create a

task, you become its owner. If you want to assign the task to someone else, you must add that person as a resource and then reassign ownership.

Create the Task from an Account, an Opportunity, a Lead, or a Contact

1. Navigate to the appropriate work area landing page and find the record. You have two options:
 - o Create the task from the landing page: Select the record (callout 1 in the screenshot) and click **Create Task** (callout 2).



- o Drill into the individual record overview and enter "create" in the Action Bar and select the **Create Task** action from there.
2. Enter the basic details about the task.
 3. You can receive a reminder using the Notifications feature by selecting a time interval in the **Set Reminder** field.
 4. Click **Task Details** and add any additional contacts and resources to the task.
- Note:** If you're creating a task for someone else, then add them as an additional resource.
5. You can make another resource the owner or remove a resource using the Actions menu (vertical three dots) next to their name.
 6. Save your task.

The task appears on the Activities page and the resources you added are notified. Contacts aren't notified. You can now edit the task:

- o Associate another record. For example, if you created the task for a contact, you can add the account.
- o Add more resources.
- o Reassign ownership.

Create the Task from the Activities Work Area

To create an appointment from the Activities work area list:

1. Navigate to the Activities work area.
2. Click in the search field and select **Create Task**.
3. Enter the basic details about the task.

4. You can associate the task to an opportunity, a lead, an account, or a contact. The task then appears in the activities for the records you select. If you don't associate the task with any record, then the stand-alone task is visible in the Activities work area and from the Sales Dashboard for the resources associated to it.

- To associate a lead, opportunity, or account, click in the appropriate field and search for them.
- To associate the task to a contact, open **Task Details** and add the contact there.

Adding a contact merely tracks the task in the contact activities. Contacts don't receive notifications about the tasks you create.

5. In **Task Details**, add additional resources and contacts.

Note: If you're creating a task for someone else, then add them as an additional resource.

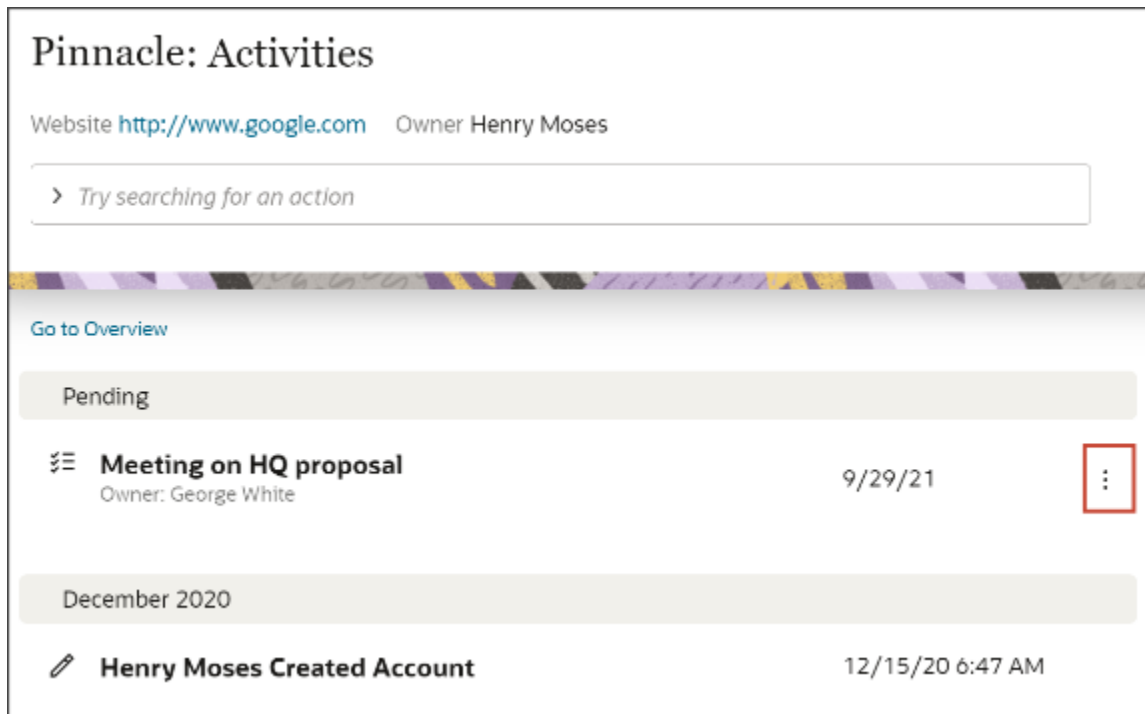
6. You can make another resource the owner or remove a resource using the Actions menu (vertical three dots) next to their name.
7. Save.

Reassign Task Ownership to Someone Else

Here's how to make someone else the task owner. You can only reassign the ownership of a task to another resource already added to the task.

You can open the task either from the Activities work area or from the Activities page in one of the records associated to it, such as the contact or the account.

1. If you're reassigning a task associated with one or more records, do the following:
 - a. Open one of the records associated with the task, such as the contact or the account, and find the task in the Activities page.
 - b. Click **Actions** > **Edit**. (The Actions menu is the icon with the three vertical dots).



2. If you're reassigning a stand-alone task, do the following:
 - a. Click **Activities** on the home page and open the task. For details, see the topic *Review and Edit Tasks and Appointments in the Activities Work Area*.
 - b. Click the task name link to drill down in to the task details.
 - c. Click **Actions** > **Edit**.
3. Click **Task Details**.

4. To assign task ownership to someone else, click **Actions** (the three vertical dots to the right of the resource) next to the resource name and select **Make Owner**.

Resources

Resource ▼

Owner	Name ↕	Email ↕	
	Eliza Mathew	eliza.mathew@donotreply.com	⋮
★	Jane Anderson	jane.anderson@donotreply.com	

Cancel Save

Make Owner
Remove Resource

10 Email

Send an Email to a Contact

Here's how to send an email to a contact without a specific context, when you don't need to track the email conversation in a lead, account, or opportunity.

1. Open the contact record for the contact you want to email.
2. In the Action Bar, enter `email` and select **Send Email**.
3. Compose the email. You can add additional recipients and attach documents. Your options differ depending on which one of the email options your organization selected:

- If you're using Office 365, then you must click **Edit** to edit the draft the application creates for you before composing your email.
- If you're using the Outlook client or another client, then don't delete the code the application inserts in the body of the email. It's used for tracking the emails and not visible to contacts. Here's an example:

```
-----  
CRM Reference:  
Oracle Digital Sales  
(##0000014003##)
```

4. Click **Send**.
5. The application saves the email in the **Activities** panel for the contact. You can read and write any follow-up emails from the same thread. You always see the first line of the latest email in the thread, but you must click it to display the full text.

When a contact replies, you get automatically notified in **Notifications** (bell icon).

If your organization has implemented the integration with Microsoft Exchange, then you can also view and reply to emails from Microsoft Office 365, Outlook, or another client application as you would normally. Provided you initiated your email conversation from within Digital Sales, your email exchange with contacts, including attachments, is available in both Digital Sales and in your email application.

Send an Email About a Lead, an Opportunity, or an Account

Here's how to send an email to a contact from individual accounts, opportunities, and leads. When you do, the mail thread can be viewed in the Activities panel of the record you send it from as well as from the contact itself.

1. Open the record you want to email about. If you're emailing about an opportunity, send the email from the opportunity. If you're emailing about a lead, send it from the lead, and so on.
2. If you see the contact you want to email in the **Contacts** panel, just click the email address.
3. If you don't see the contact, view all contacts using either method:
 - Click **Show All Contacts**.

- Enter **show** in the Action Bar and select **Show Contacts**
- 4. Click on the email address.
- 5. Compose the email. You can add additional recipients and attach documents. Your options differ depending on which one of the email options your organization selected:
 - If you're using Office 365, then you must click **Edit** to edit the draft the application creates for you before composing your email.
 - If you're using the Outlook client or another client, then don't delete the code the application inserts in the body of the email. It's used for tracking the emails and not visible to contacts. Here's an example:

```
-----  
CRM Reference:  
Oracle Digital Sales  
(##0000014003##)
```

- 6. Click **Send**.
- 7. The application saves the email in the Activities panel for the record where you're composing it. You can read and write any follow-up emails from the same thread. No matter where you send the email, you can always access the thread on the contact's activity stream. You can see the first line of an email, but you must click it to display the full text.

When a contact replies, you get automatically notified in **Notifications** (bell icon).

If your organization has implemented the integration with Microsoft Exchange, then you can also view and reply to emails from Microsoft Office 365, Outlook, or another client application as you would normally. Provided you initiated your email conversation from within Digital Sales, your email exchange with contacts, including attachments, is available in both Digital Sales and in your email application.

Send or Log an Email Directly from Lists of Activities

Where appropriate, you can send or manually log an email to the participants in tasks and appointments directly from the list of activities in the Activities page. There's no need to open the task or appointment first.

To send or log an email, click **Actions (three vertical dots)** for a task, or appointment in the Activities page and select **Send Email** or **Log an Email**.

- **Send Email** opens an email compose window addressed to all the contacts associated with the record in the To field. Resources are copied (entered in the CC field).
- **Log an Email** opens a window where you can enter an email that was sent outside the application, so it's available for reference.

Review Email Responses

When a recipient of your email replies, the reply gets automatically routed to the email thread where you started the conversation and you get notified using Notifications (bell icon) on the toolbar at the top of the page.

1. You can check the activity stream for replies or open the record and email thread from the notification:
 - a. Click the Notifications (bell) icon if you see a number indicating the number of unopened notifications.

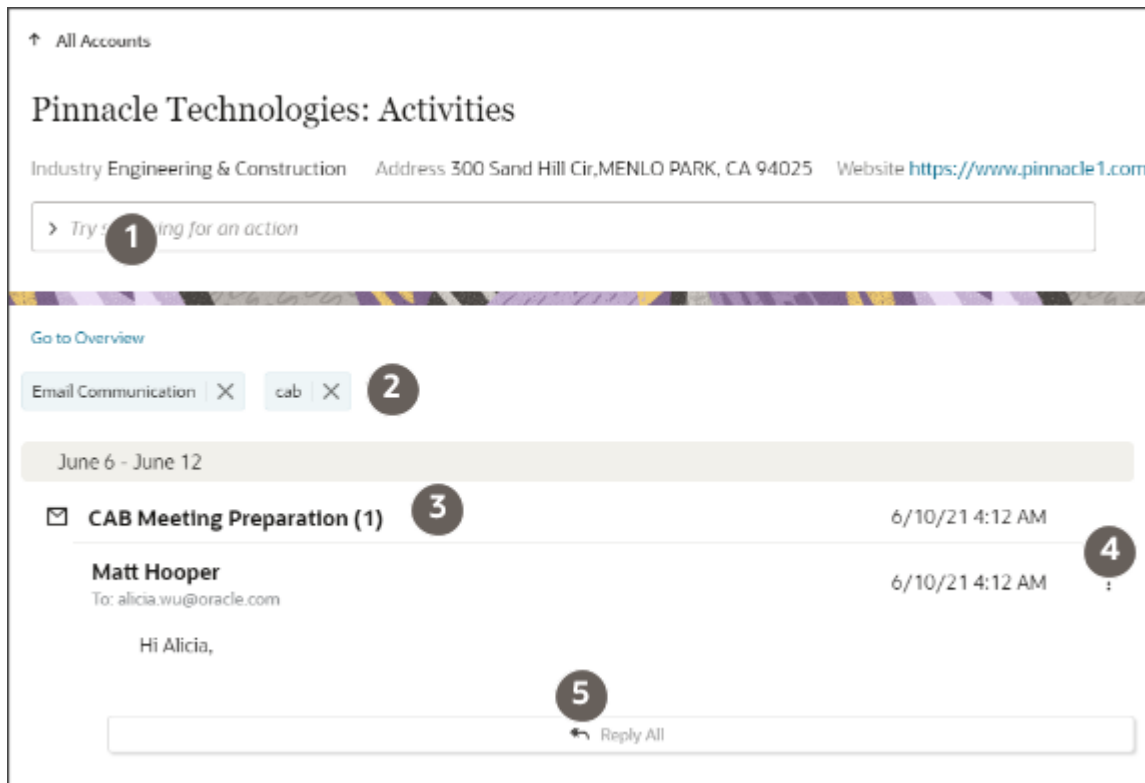
- b.** Click on the notification with the subject line of your email to open the record and thread.

If your organization has implemented the integration with Microsoft Exchange, then you can also view and reply to emails from Microsoft Office 365, Outlook, or another client application as you would normally. Provided you initiated your email conversation from within Digital Sales, your email exchange with contacts, including attachments, is available in both Digital Sales and in your email application.

Reply to Emails

Here's how to reply to an email or follow up to one you sent:

1. When you receive a notification that a contact replied to your email, click the link to open the record where you sent the email.
2. Alternatively, you can search for record yourself or open the record of the contact who sent reply.
3. In the **Action Bar** (callout 1 in the screenshot), enter **Filter** and select **Filter Email Communication** to display only the emails in the list of activities.



4. The reply you received is most likely to be in the first email thread in your list. When a reply arrives in a thread, the number in brackets on the subject line increases, the time stamp reflects time the reply was received, and the thread moves to the front of the activities in the time line.(callout 3)
5. Alternatively, you can search for the email thread by one of the keywords in the subject or text. The filters you add display below the Action Bar (callout 2)
6. To view all the emails in the thread, click on the subject line. Each email in the thread shows only the first line of the text. You must click on the subject line or each email if you want to read the full text.
7. To reply to all recipients, click **Reply All** (callout 5).

8. For the widest range of send options, click **Actions** (three vertical dots identified by callout 4) and select one of the options:
 - Forward
 - Reply
 - Reply All
9. Compose your email and add any attachments and send. You can't save drafts of the email to send later.

Find and Review Emails

You can view emails and their replies as threads on the record where the original email was sent and in the activity streams of the contacts who receive the emails.

1. If you know the record from where the original email was sent, then open it. For example, if the email was sent from an opportunity, then open the opportunity.
2. If you don't know the record from where the email was sent, but you know the recipient contact, then open the contact.
3. To find emails in the activity stream, you have different options:
 - You can review all the emails in the activity stream. Just enter "email" in the Action Bar and select **Filter Email Communication**.
 - You can find specific emails by filtering on a word in the text. Just enter the text in the Action Bar and select the Filter option. For example, to search for the email with the word "executive", enter the word and select **Filter executive**.
The search retrieves all items with the text, including notes, calls, tasks, and so on.
 - If your search returns too many items, just use the Email Communication and word filters in combination.

Log an Email You Sent or Received Outside the Application

Provided you start an email conversation from an account, a contact, or a lead, both outgoing and incoming emails are logged automatically in Activities as a thread. The most recent email appears at the top. If you send the initial email from outside the application, from a personal email account, for example, then the email thread doesn't get automatically logged in Activities. You can still track any outgoing and incoming email in Activities by manually entering it.

Here's how to manually log an email.

1. Display the record where you want to log the email.
2. In the **Action Bar**, enter **Log an Email**.
3. In the Log an Email page, enter the required information:
 - Recipients (To, CC, and BCC fields).
 - Subject
4. Enter the email text.

5. Select the date the email was sent or received.
6. In **Email Type**, specify if you're logging an inbound or outbound email.
7. Add any attachments.
8. Save.

Results:

Each email you log manually appears as a separate entry in Activities. You don't get the threads you have with automatic email logging.

Oracle Microsoft 365 Add-in

Save Emails Shared from the Add-In as Conversations

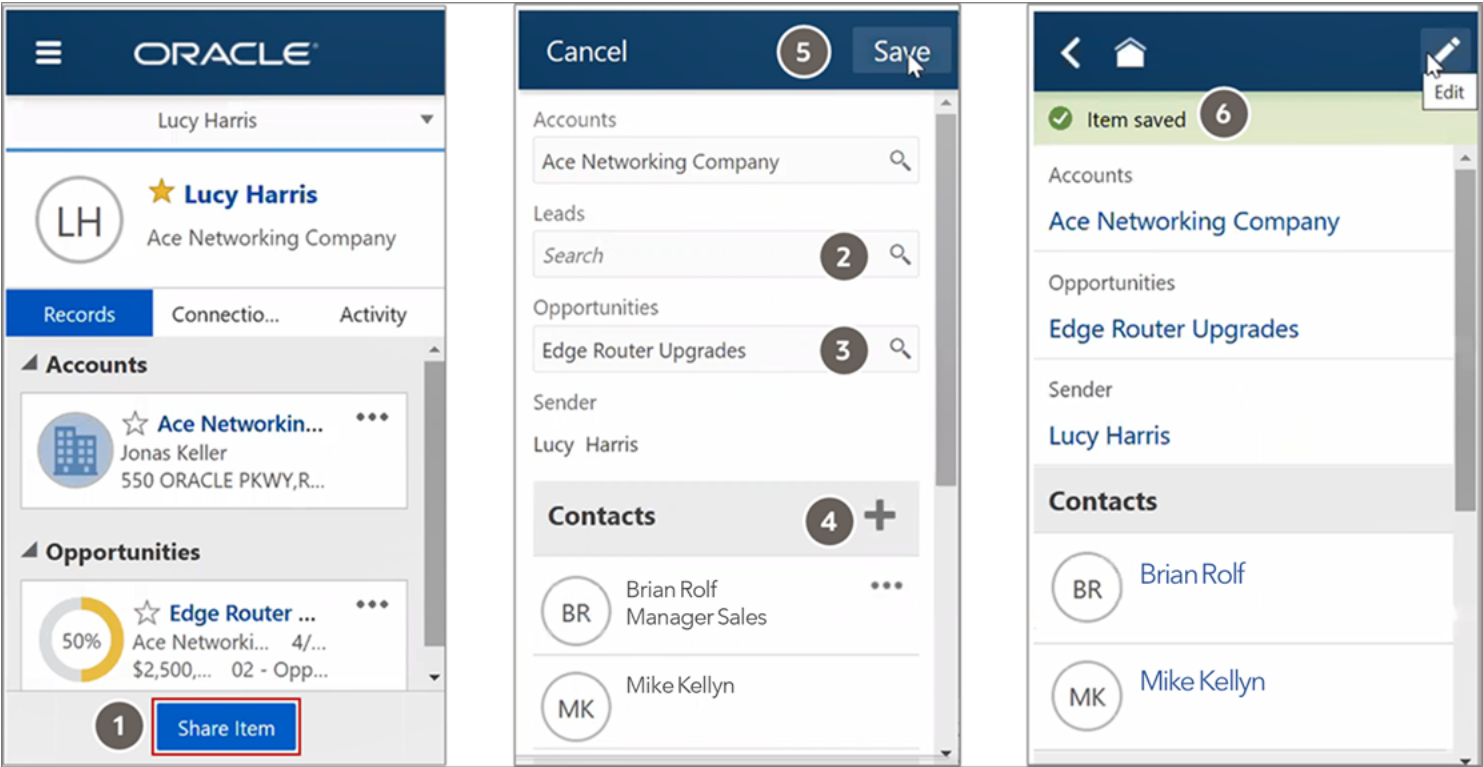
Forwarded emails, emails sent or received, and emails in the same thread with the same subject line are saved as conversations.

An email and its subsequent replies are shared as a single conversation, instead of as multiple tasks. All the replies to the emails are threaded within the conversations in chronological order, with the most recent email at the top.

Share Emails From the Add-In

From the Microsoft 365 add-in, you can share emails to save them as conversations.

Here are three screenshots of the Microsoft 365 add-in that show the email share flow from the add-in. The actions and features are indicated in callouts 1 to 6.



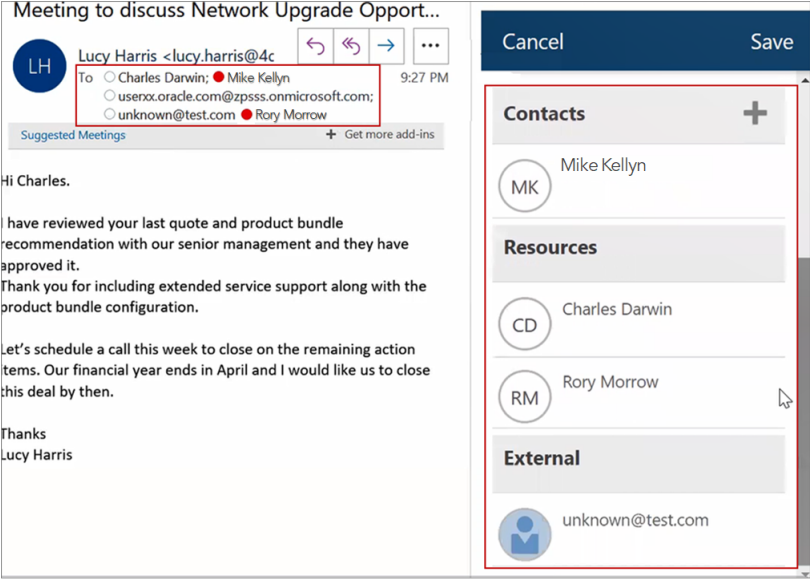
Here's how you share emails as conversations from the add-in. The callouts in the screenshot are covered within these steps:

1. Select an email and click **Share Item** (callout 1) from the add-in.

The Share Email edit page appears. On the Share Email page, review and add more details, such as leads and opportunities, before sharing the email.

This table explains the fields on the Share Conversation UI in the add-in:

Field	Description
Accounts	Shows the account associated with the contact or resource addressed in the email. We strongly recommend that you associate only one account with the email.
Leads	Shows the lead name associated with a contact or resource addressed in the email. You can associate more leads to the email you're sharing with the sales application (callout 2).
Opportunities	Shows the opportunity name associated with a contact or resource addressed in the email. You can associate multiple opportunities with the email you're sharing with the sales application (callout 3).
Sender	Shows the name of the sender of the email.
Contacts	The contacts in the To and CC fields of your email appear in Contacts. Click the plus icon to associate more contacts (callout 4) to the conversation.

Field	Description
Resources	Your team members or employees addressed in the To or CC fields appear under Resources.
External	A person not saved as a contact or resource in the sales application is considered as an external person. Such people addressed in the To or CC fields appear in the External area. Note: You can't add resources or external people to the conversation. 

2. Click **Save**.

You get a confirmation message that the email is saved (callout 6).

Note: The File attachments, Summary, Call Report, and Notes subtabs aren't supported in the Share Conversation view of the add-in.

The email is shared with the sales application and is saved as a new conversation. If the email you shared is a subsequent reply of an earlier email that was already shared with the sales application, the reply is saved to that thread.

Related Topics

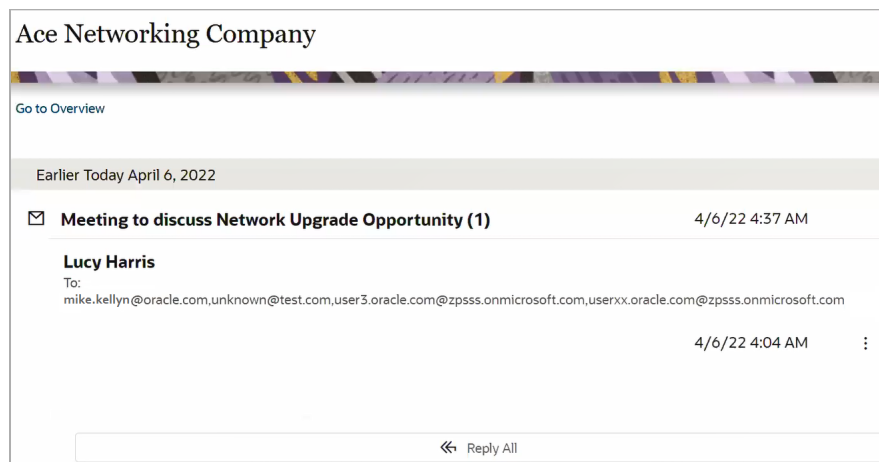
- [See the Conversations You Shared from the Add-In](#)
- [Emails as Conversations](#)

See the Conversations You Shared from the Add-In

The conversations you have shared from the add-in appear in the Activities panel of the different business object pages in Digital Sales.

The most recent conversations appear below the **Recent** header.

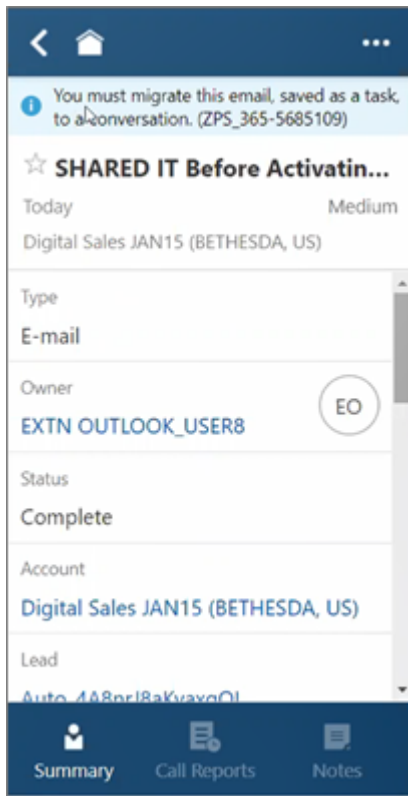
Click **View All Activities** in the panel to see all the conversations shared with the sales application. Here's a screenshot of the Activities area of an account that shows an email shared from the Oracle Microsoft 365 add-in, saved as a conversation:



Dealing with the Past Emails

If your administrator has enabled the profile option to save emails as conversations, the add-in shows you a message to migrate your past emails to conversations. The message appears when you open an email shared in the past, before the profile option was enabled.

Here's a screenshot that shows the migration message on the banner of the add-in:



Migrating the past emails is optional. Contact your administrator to learn more.

Why didn't my email replies get shared with the sales application?

If the subject of an email is modified or deleted, Outlook doesn't recognize that email as an in-reply-to email.

These email replies aren't shared in the original email thread that was shared with Sales.

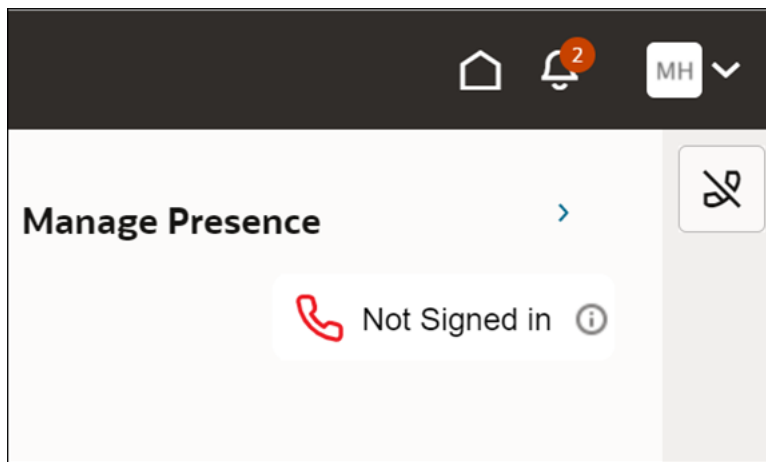
See the [Automatically Share Email Responses of Manually Shared Emails](#) topic to learn more.

11 Calls

Make Yourself Available for a Call

Set your presence and availability by doing the following:

1. From the Home page, click any of the tiles, such as Contact, Leads, or Opportunities.
2. Click the **Manage Presence** icon as shown in the following example:



Note: To receive and make calls, you must have at least one of the following privileges: Inside Sales, Sales Manager, or Sales VP.

Place an Outbound Call

Here's how you perform one of the most common tasks, placing a call. If you're using Service Center, you can call a contact from a service request. If you're using Digital Sales, you can call a contact, an account, and a lead.

1. Make yourself available for a call.
2. On the Overview page of a service request, contact, account, or lead record, click the phone number link. The Call panel is displayed on the page.

Note:

- If you're using Digital Sales, you can also type **Call** in the **Action Bar** to initiate the call.
- On the Overview page of a contact, account, or lead record, click **View All Service Requests** in the **Service Requests** panel, to view all service requests associated with that record.

3. In the Call panel, click **Actions** (horizontal 3 dots icon) to put the call on hold, end the call, or transfer the call to another agent. Click the **Mute** icon to mute the call.
4. In the **Notes** field, you can take notes and record information while you're engaged in the call.
Any notes you add become part of the wrap up record. You can add or edit your notes during the wrap up session (only in Service Center).
5. Click **Actions** (horizontal 3 dots icon) > **End Call** when finished.
The wrap up section is displayed (only in Service Center).
Note: Wrap up is enabled in Service Center, but it's turned off by default in Digital Sales.
6. From the **Outcome** drop-down list, select an outcome for the call, and add any additional notes you may want.
7. Click **Save**.
All outgoing interactions are recorded in the activity feed of the record on which you are taking the action.
8. To edit an interaction, hover over it, then click the **Edit** (pencil) icon.
You can edit the note or change the outcome value from the drop-down list.
Note: You can't edit the interactions for calls that were canceled or missed.
 - Canceled calls are the calls that you canceled before the customer answered them.
 - When it's unknown why a call was missed (for example, canceled, rejected, or abandoned), it's recorded as a missed call.
9. In the **Create Task** section (displayed only in Digital Sales), enter any follow up information, and click **Create**.

Call a Contact Directly from the List of Activities

You can call contacts in tasks and appointments directly from the list of activities in the Activities page. There's no need to open the task or appointment first.

To call contacts, click **Actions** (three vertical dots) for a task or appointment in the Activities page and select **Call**.

- If there's only one contact, then the number dials directly.
- If there are multiple contacts, then you get to select which contact to call.
- If there are no contacts associated with the task or an appointment, then you have the choice of searching for a contact to call or dialing a number.

Receive an Inbound Call

Here's how you handle incoming calls:

1. Make yourself available for a call.
2. Click **Answer** to accept the incoming call.

- If a single matching record is found for the incoming phone number, then based on the screen pop rules defined:
 - If the caller is a service customer who's calling for a service request, the Overview page of the selected service request record is displayed.
 - If the caller is a contact or lead (if you're using Digital Sales), the Overview page of the selected record is displayed.
- If multiple matching records or no matching records are found for the incoming phone number, the Unknown Contact page is displayed.
 - Here, you can either search for an existing contact, or create a new contact.
 - If you're using Digital Sales, you can additionally search for an existing lead, or create a new lead.

For more information, see the topics "Search for an Existing Contact or Lead from an Incoming Call" and "Create a New Contact or Lead from an Unknown Caller".

3. In the Call panel, verify the customer-provided details with the details displayed on the Overview page of the selected record, and click **Verify**.

Note:

- Contact verification is enabled in Service Center, but it's turned off by default in Digital Sales.
- Until you click **Verify** in the Call panel, the **Search Again** action will be available for you to search for another contact. Click **Search Again** to go the Unknown Contact page and search for a new contact or lead.

4. In the Call panel, click **Actions** (horizontal 3 dots icon) to put the call on hold, end the call, or transfer the call to another agent. Click the **Mute** icon to mute the call.

5. Enter notes related to the call in the **Notes** field.

Any notes you add become part of the wrap up record. You can add or edit your notes during the wrap up session (only in Service Center).

6. Click **Actions** (horizontal 3 dots icon) > **End Call** when finished.

The wrap up section is displayed (only in Service Center), where you specify the call disposition and complete your notes from the call.

Note: Wrap up is enabled in Service Center, but it's turned off by default in Digital Sales.

7. From the **Outcome** drop-down list, select an outcome for the call, and add any additional notes you may want.
8. Click **Save**.

All incoming interactions are recorded in the activity feed of the record on which you are taking the action.

9. To edit an interaction, hover over it, then click the **Edit** (pencil) icon.

You can edit the note or change the outcome value from the drop-down list.

Note: You can't edit the interactions for calls that were rejected or abandoned.

- Rejected calls are the calls that you declined to answer.
- Abandoned calls are the calls where the customer ends the interaction before you accept it.

10. In the **Create Task** section (displayed only in Digital Sales), enter any follow up information, and click **Create**.

Search for an Existing Contact or Lead from an Incoming Call

On occasion, you may receive a call from a number that isn't associated with a contact or lead. After speaking with the caller, you do a search, then associate the call with a contact that's already recorded in the application. This topic shows you how to do it.

1. After a call comes in from an unknown number, click **Answer**.

The Unknown Contact page opens with the unknown number auto-filled in the **Lookup Contacts and Leads** search field (in Digital Sales), or the **Lookup Contacts** search field (in Service Center).

2. If the contact is known, but perhaps just calling from a different number, enter the contact's name in the search field.
3. Select the contact name from the results.

The Unknown Contact page refreshes and displays the Contact Overview page (along with the Call panel) for the contact you selected.

Note: Until you click **Verify** in the Call panel, the **Search Again** icon will be available for you to search for another contact. Click **Search Again** to go the Unknown Contact page and search for a new contact.

Create a New Contact or Lead from an Unknown Caller

Occasionally, you will get a call where the number is unknown and there's no existing contact record in the database.

If you're using Digital Sales, this could also be a new lead. If you're using Service Center, it could also be a service customer calling from a different number than what's associated with the service request.

So, you've received the call, but haven't found an associated record. Here's what you do in this case:

1. After a call comes in from an unknown number, click **Answer**.

The Unknown Contact page opens with the unknown number auto-filled in the **Lookup Contacts and Leads** search field (in Digital Sales), or the **Lookup Contacts** search field (in Service Center).

2. After you've entered the caller's name in the search field and there are no results, you can take notes in the **Notes** field, and end the call. You can also create a new contact or a new lead while you're on the active call, or after you end the call.
 - a. To create a contact, click **Create Contact**. The Create Contact page is displayed.
 - b. To create a lead (in Digital Sales), click **Create Lead**. The Create Lead page is displayed.
 - c. In the form, fill out the required information and save the record.

After the new record is created, the page refreshes and displays the Overview page (along with the Call panel) for the record you created.

Note: Until you click **Verify** in the Call panel, the **Search Again** icon will be available for you to search for another contact. Click **Search Again** to go the Unknown Contact page and search for a new contact or lead.

- d. Click **Save**.

Log a Manual Call

If your organization doesn't have telephony integration, and you're using a desk phone, this is how you can log inbound or outbound call notes manually.

1. Navigate to the Overview page of the service request, account, contact, or lead record.
2. In the **Action Bar**, enter **Log a Call**.

The Call panel is displayed.

3. Enter notes related to the call in the **Notes** field.
4. From the **Call Type** drop-down list, select **Inbound** or **Outbound**.
5. From the **Outcome** drop-down list, select an outcome for the call.
6. Click **Save**.

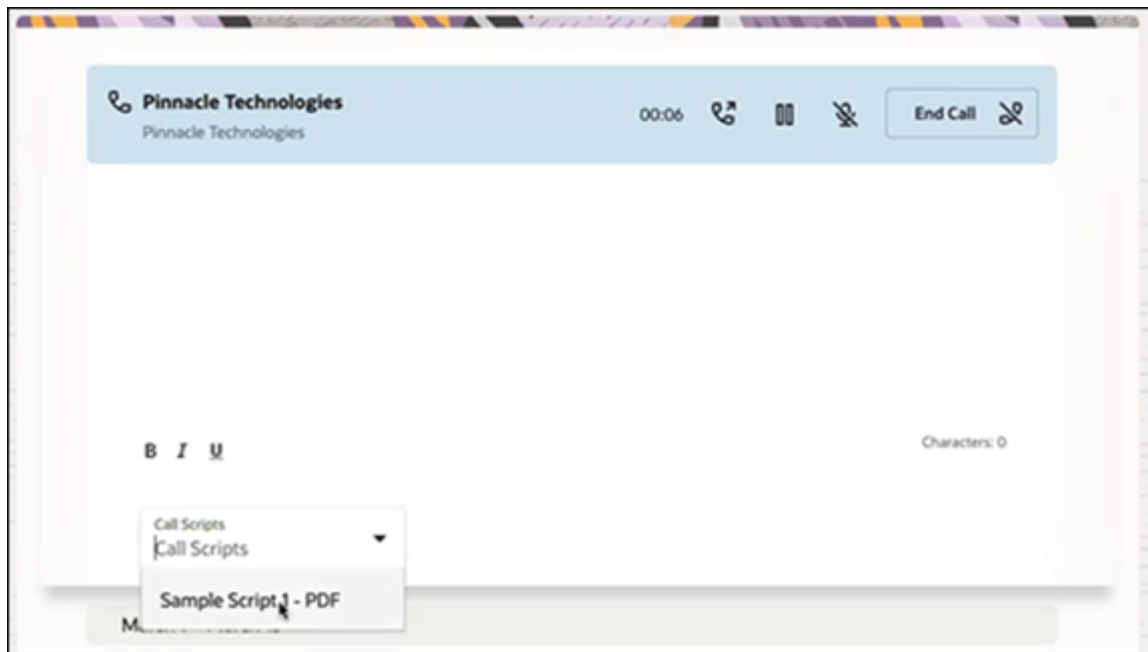
All incoming and outgoing interactions are recorded in the Activities page of the record on which you are taking the action.

7. To edit the record on the Activities page, hover over it, then click the **Edit** (pencil) icon to edit the notes, or change the outcome value from the drop-down list.
8. Click **Save**.

Use Call Scripts

Your sales administrator can provide you with scripts you can use to guide your calls with customers. Here's how you access a call script:

1. When engaged in a call, in the call record, click the **Call Scripts** drop-down list, and select a call script as shown in the following example:



2. When you open a script, it launches in a separate browser tab, which you can pull out to a separate window. So, you can keep the script open while you're on the phone and taking notes.

12 Performance

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.

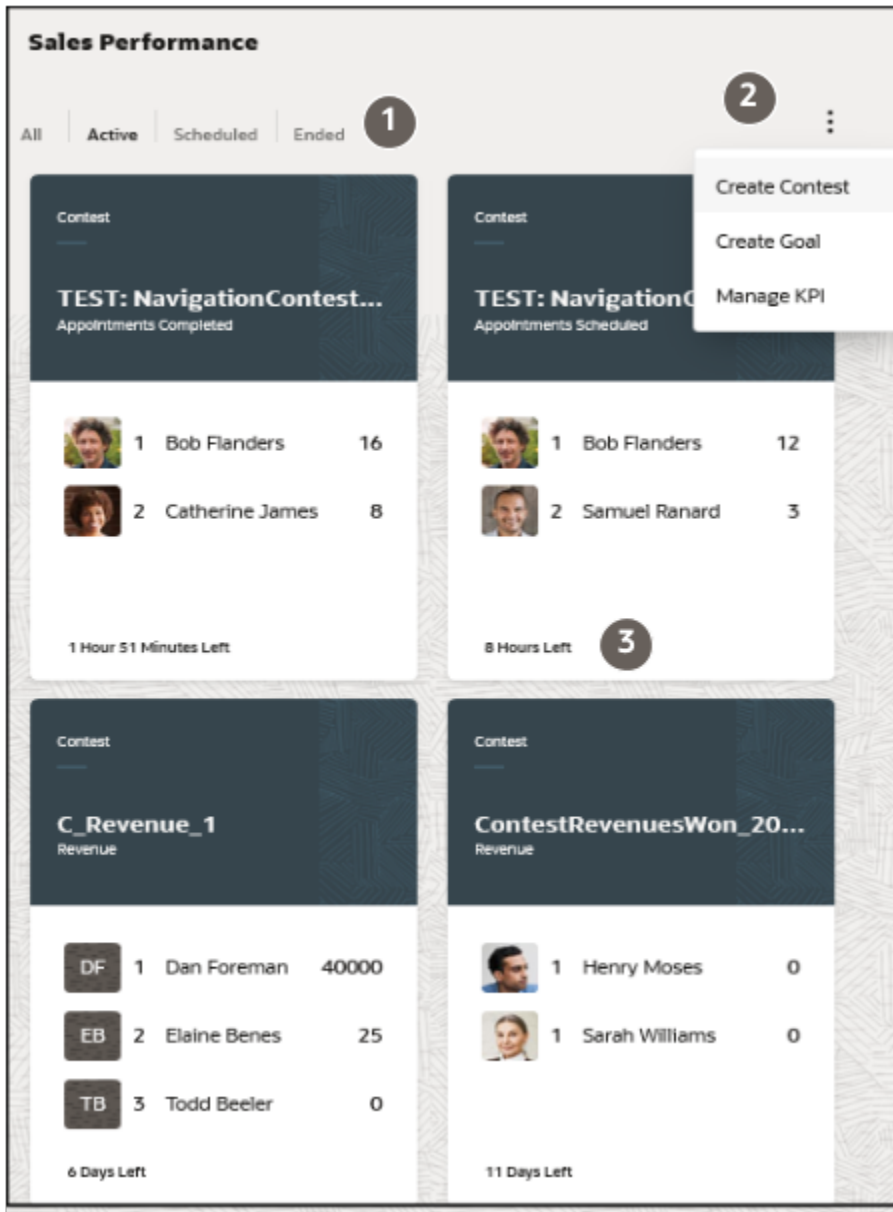
For example, to boost sales of a product recently released into the market, a sales manager creates a contest. The contest is for a defined period of time and is aimed at increasing the number of calls the sales team makes to potential customers. Participants, in competition mode, try to maximize the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

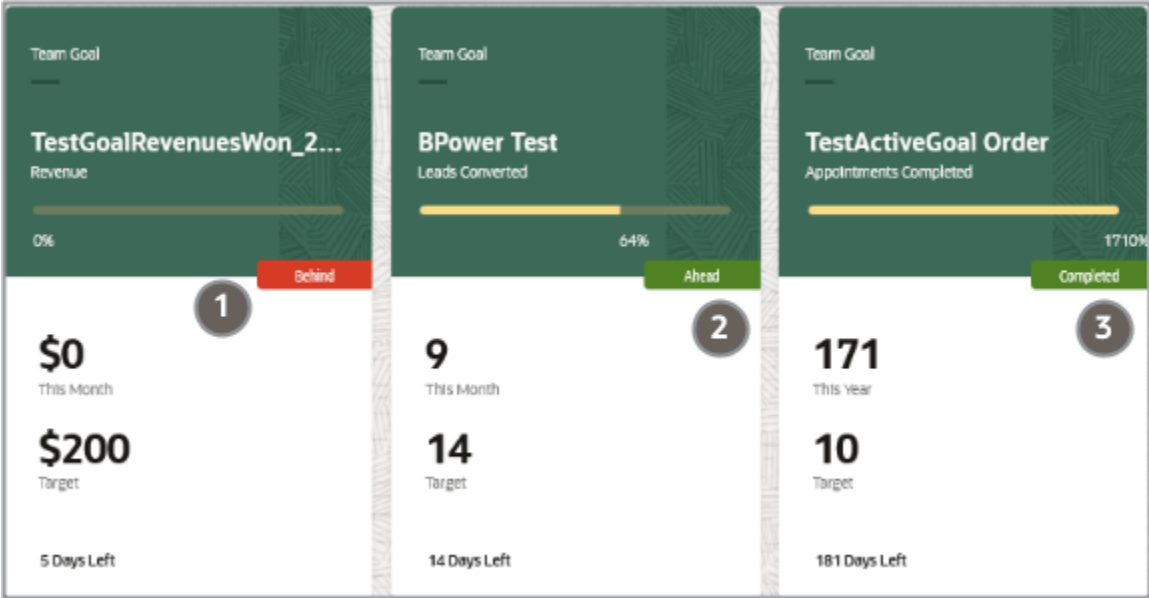
Create and manage goals to ensure the team focuses on key performance indicators and review and monitor the progress of each individual.

- 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.



About Key Performance Indicators (KPI)

Sales managers want to track their team's performance so that they can coach and motivate sales representatives to boost sales.

Digital Sales performance feature lets you select key performance indicators (KPI) on your goals or contests. You can use custom KPIs for your team's goals or contests where all the team members compete to get the highest score for a KPI. This helps focus salespeople to complete their high priority tasks as soon as possible.

Oracle provides a number of predefined key performance indicators (KPIs) that sales managers can use when creating goals and contests. Sales administrators can manage and create custom KPIs by following the procedures outlined in the Key Performance Indicators (KPI) chapter of the Implementing Digital Sales guide. Here's a list of the KPIs provided by Oracle.

KPI Name	This KPI measures the...
Appointments Completed	Number of appointments completed.

KPI Name	This KPI measures the...
Appointments Scheduled	Number of appointments scheduled.
Call Activities Completed	Number of call activities completed.
Calls Made	Number of calls completed.
Demos Completed	Number of demo activities completed.
Email Activities Completed	Number of email activities completed.
Emails Sent	Number of emails sent.
Leads Converted	Number of leads converted.
Opportunities Created	Number of opportunities created.
Opportunities Won	Number of opportunities won.
Revenue	Sum of the revenue for won opportunities.
Tasks Completed	Number of tasks completed.

Why can't I see the activity history for my custom KPI?

You sales administrator can select the **Show activity history** radio button to turn on or turn off the display all history activities for a given custom KPI. If the radio button is deselected, then individual or team activity entries for goal and contests related to KPI progress won't appear in the history panel.

However, audit entries such as contest created, goal updated, participant added, participant removed and so on will continue to be displayed.

Contests

Create a Contest

Any effective sales contest requires strategic planning, clear metrics, and be transparent for the competing sales representatives. Contest metrics must be achievable and requires a Key Performance Indicators (KPI).

Here's how to create a contest.

1. Navigate to **Digital Sales > Sales Performance**.
2. From the Performance dashboard, click the Actions menu (3 vertical dots icon).
3. Select **Create Contest**.
4. Add contest name.
5. Select a KPI for the contest.
6. Add a start date and end date.
7. Search for and select resources to add as participants to your contest.

Note:

You can search for participants by name within your organization from the **Search and add resource** field. You can also clear the **My Organization** filter from the Actions menu (3 horizontal dots icon) next to the **Search and add resource** field to search and add resources to your contest from outside your organization.

Alternatively, you can select a resource from a hierarchy and can choose whether to add directs or the entire organization for the selected resource as shown in the sample screenshot.

Note: The UI is optimized to cater for the inclusion of up to 30 resources (participants) from a hierarchy for each contest.

Participants Total 46

Search and add resource
Sarah Williams

▼ Add Resources by Org

Select resource from hierarchy
Conor Barry

Add Directs: 4 Resources

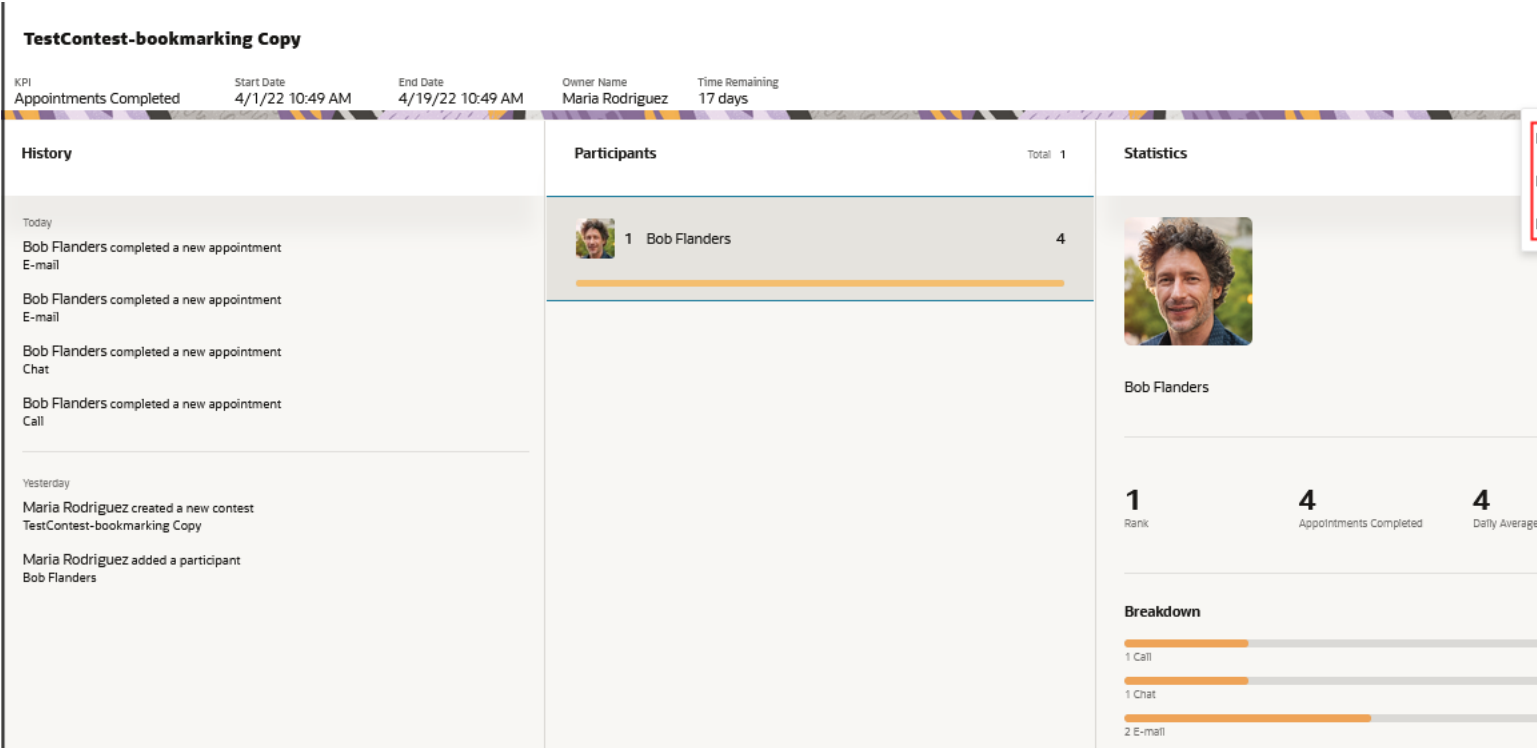
Add Entire Org: 46 Resources

8. Click **Save**.

You can't change the KPI once your contest becomes active. The contest is now created with the following details:

- Scheduled label is displayed beside the newly created contest name
- Owner Name and Stating In fields are added to the header details
- The History card displays the recent activity for this contest
- Edit, Duplicate, and Delete actions are available from the Actions menu (3 vertical dots icon)

When you click on a contest card from the Sales Performance dashboard, a page similar to the following is displayed where you can view and perform actions on the contest.



Who has access to contests?

Digital Sales users gain access to contest records through membership of the resource hierarchy as well as through participation in the contest.

Users assigned the Sales Administrator job role get full access to all contests based on their privileges, regardless of where the administrators are in the management hierarchy and whether or not they're participants of a contest.

In general, you can access a sales contest if you have created it, you're a participant, or if one or more of your subordinates is a participant. The user who creates or owns the contest can edit or delete the contest. Sales administrators can view all contests and can edit and delete any contest. For more information, see the section How Users Gain Access to Sales Contests in the Data Sharing and Visibility topic of the Implementing Digital Sales guide.

- Related Topics
- Data Sharing and Visibility

Goals

Create a Goal

Creating goals and sales targets help keep you and your sales team focused on achieving your goals. A sales target lets you easily measure and estimate contributions to your teams and individual sales goal.

Here's how to create a goal.

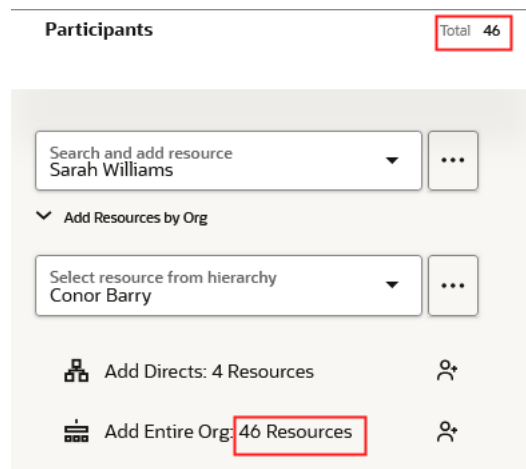
1. Navigate to **Digital Sales > Sales Performance**.
2. From the Performance dashboard, click the Actions menu (3 vertical dots icon).
3. Select **Create Goal**.
4. Add goal name.
5. Select a KPI for the goal.
6. Enter a common target associated with the selected KPI.
7. Select a frequency from the following:
 - o Daily
 - o Weekly
 - o Monthly
 - o Quarterly
 - o Yearly
8. Add a start date and end date.
9. Search for and select resources to add as participants to your goal.

Note:

You can search for participants by name within your organization from the **Search and add resource** field. You can also clear the **My Organization** filter from the Actions menu (3 horizontal dots icon) next to the **Search and add resource** field to search and add resources to your goal from outside your organization.

Alternatively, you can select a resource from a hierarchy and can choose whether to add the directs or the entire organization for the selected resource as shown in the sample screenshot.

Note: The UI is optimized to cater for the inclusion of up to 30 resources (participants) from a hierarchy for each goal.



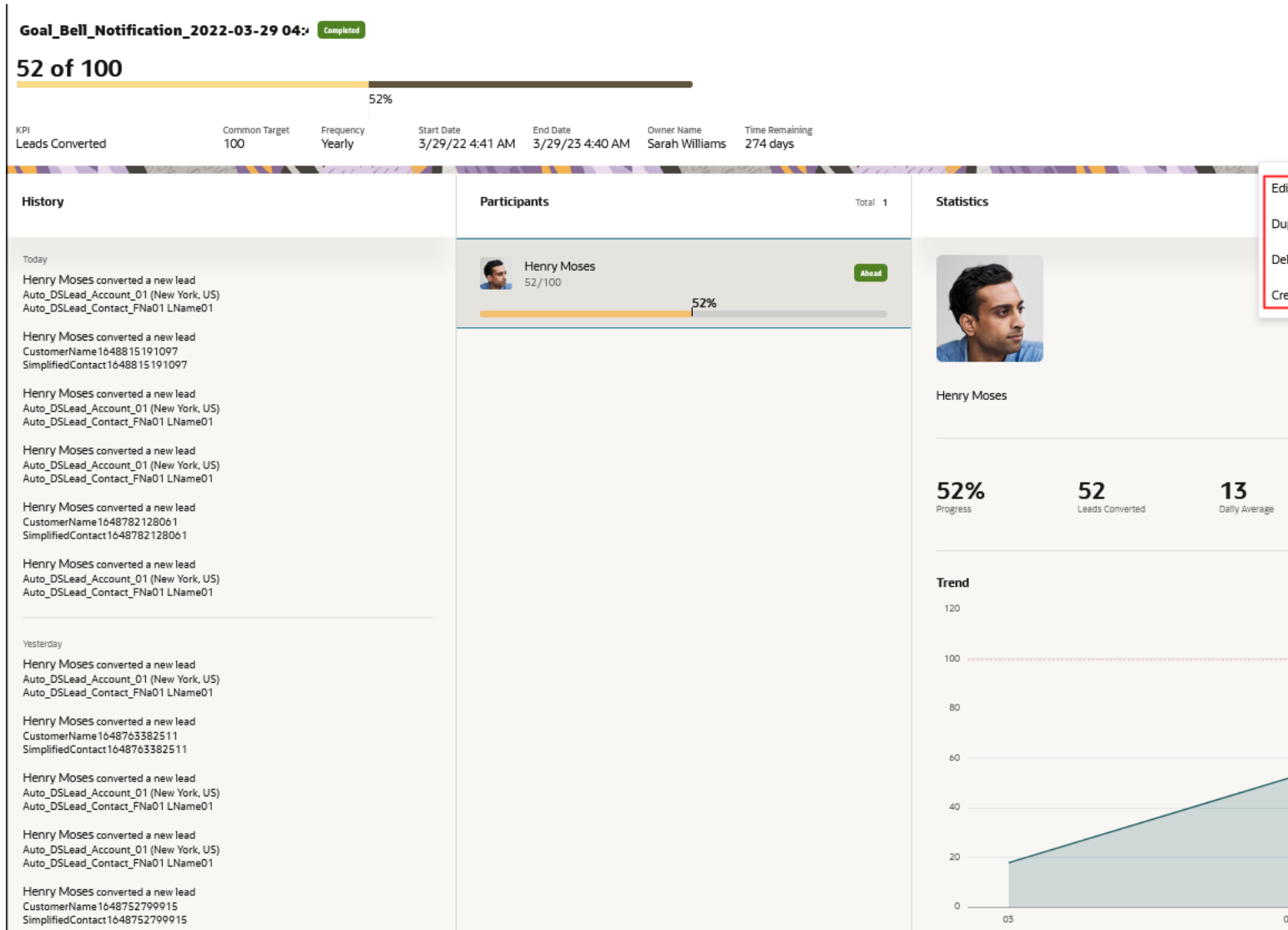
10. Update the target level for the participant, if required. All participant targets are set to a common target when added.
11. Click **Save**.

You can't change the KPI once your goal becomes active. The goal is now created with the following details:

- Scheduled label is displayed beside the newly created goal name

- Owner Name and Stating In fields are added to the header details
- The History card displays the recent activity for this goal
- The Statistics card displays the % progress, KPI achieved and daily average statistics
- Edit, Duplicate, Delete, and Create as Contest actions are available from the Actions menu (3 vertical dots icon)

When you click on a goal card from the Sales Performance dashboard, a page similar to the following is displayed where you can view and perform actions on the goal.



Goal Progress Indicators Explained

Once a goal becomes active, salespeople can view progress indicators to quickly check if they are on track to achieve their goal for each specific goal period.

For example, if the goal is to make at least 15 calls daily, then progress for that goal is tracked each day. If a goal is set to convert 20 leads monthly, then the progress for that goal is tracked each month.

The goal progress indicators indicate the following:

Goal Progress Indicator	Participant or team ...
On Track	Is on track to achieve their goal.
Ahead	Is ahead of their target to achieve their goal.
Behind	Is lagging behind in reaching their target achievement.
Completed	Has reached 100% or more of their target and the goal has ended.

Note: If you don't want to have progress indicators displayed for your active goals, then your sales administrator can set the Goal Progress Indicators Enabled profile option to No.

Consider the following when determining goal progress indicators:

- Working time is 9:00 a.m. to 5:00 p.m. in user's time zone.
- No progress indicator is displayed for the following goal periods:
 - Daily - first hour
 - Weekly - first 4 hours
 - Monthly/Quarterly/Yearly - first day
- A percentage leniency is applied to the progress indicator if the goal is within 5% of the target achievement.
- No leniency is given towards the end of a goal period to ensure that the participant or team gets a true indicator of whether or not they will be able to meet their target.

Let's look at an example of Mark, who is one of the participants in a team working in the PST time zone. He has a daily goal to complete 15 calls per day and the goal starts on 1 Feb 2021 at 12:00 a.m. During an 8-hour day, it is estimated that Mark makes 2 calls per hour and the minimum range is rounded down to the nearest number. Here's the expected scenario.

- For the first hour of Mark's day (9:00 a.m. to 10:00 a.m.), no progress indicator is displayed for Mark's goal irrespective of the number of calls he makes.
- Starting from 10:00 a.m. PST, the **On Track** progress indicator is displayed if Mark is at least within 5% range of the estimated 2 calls per hour. Hence, if he completes 1 call in the first hour, he would be on track. If he completes 2 calls or more, his progress would indicate that he is **Ahead**.
- Halfway through the day at 1:00 p.m., Mark is considered on track if he has completed, or is at least within the 5% leniency range of, the estimated 7.5 calls made. Hence, if he completed 7 to 8 calls, the progress indicator displays On Track. If he completed more than 8 calls, a progress of Ahead is indicated for Mark.
- In the last hour of the day, the 5% leniency is not applied. So, at 4:00 p.m. PST, Mark will be on track if he at least completed 13 calls.

However, for the last 15 minutes of the daily goal target, the expectation is to have completed the goal. So, the progress indicator will display as **Behind** if Mark hasn't completed 15 calls.

Now, let's look at an example of a weekly goal to schedule 10 customer appointments each week. Lisa is one of the participants working in the PST time zone and her weekly goal starts on Monday 3 Jan at 12:00 a.m.

- At the start of the day on Monday, for the first 4 hours (from 9:00 a.m. to 1:00 p.m.), no progress indicator is displayed irrespective of the number of appointments Lisa scheduled.
- At 2:00 p.m., **On Track** is displayed if Lisa has scheduled 1 or 2 appointments. If she schedules more than 2 appointments by that time period, then her progress indicator will be shown as **Ahead**.
- At mid-week, on Wednesday 5 Jan at 1:00 p.m., Lisa will be on track if she has scheduled at least 4 appointments and will be ahead if she schedules more than 6 appointments.
- In the last 4 hours of her weekly goal, the 5% leniency is not applied. This means that on 2:00 p.m. on Friday 7 Jan, a progress indicator of **On Track** is displayed for Lisa if she has at least scheduled 9 appointments.
- During the last hour on Friday, the progress will display as **Behind** for Lisa if she hasn't by then met her target of 10 appointments.

What's the difference between a team goal and a goal?

Team goals are a rollup of all team member's goals. For example, a sales manager has 7 direct reports on his team and all of them are added to a goal to make 20 calls daily.

The team's goal is to make 140 calls daily. Sales managers can view team goals for goal participants on their team whereas a sales representative can only view the specific goal created for them.

The following shows what details are available from the performance dashboard for a sales manager and a sales representative.

Sales Manager View	Sales Representative View
Team goal details for their team	Goal card for the participant
Participants belonging to their team - sorted by progress %	Individual goal progress and trend
History of goal creation and updates	History of goal creation and updates for their goal and contest
History of records by their team members that contributes to their KPI	History of their own progress made on goal
Statistics for each participant (individuals) - KPI achieved, % progress and daily average	Statistics for KPI achieved, % progress and daily average individually achieved
KPI by category bar chart for each participant	KPI by category bar chart for individual
Trend chart of progress by each participant (except for daily goal)	Trend chart of individual progress

Who has access to goals?

Digital Sales users gain access to goal records through membership of the resource hierarchy as well as through participation in the goal.

Users assigned the Sales Administrator job role get full access to all goals based on their privileges, regardless of where the administrators are in the management hierarchy and whether or not they're participants of a goal.

In general, you can access sales goal data for yourself and other participants who are part of your direct and indirect reports. Sales administrators can access all goals and all goal participants, and can edit and delete any goal. For more information, see the section How Users Gain Access to Sales Goals in the Data Sharing and Visibility topic of the Implementing Digital Sales guide.

Related Topics

- [Data Sharing and Visibility](#)

13 Opportunities

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.

Overview of Opportunity Record Details

Salespeople can capture opportunity information, such as customer (account) and the products they want to purchase. They use guided sales methods and sales stages to step the opportunity to its eventual conclusion.

Here's a summary of the predefined opportunity record details that appear on your opportunities saved search list page:

Field	Description
Win Probability	Displays the likelihood (in percent form) of winning the opportunity. You manually set the win probability at the opportunity level for the sales stage. If you don't want your sales stages to control opportunity win probability, make sure that no value exists in the win probability field. When you move an opportunity from one sales stage to the next, the opportunity-level win probability increases to reflect the progress of the opportunity. The win probabilities of all product lines that are in sync with the opportunity-level win probability also change to match the opportunity-level probability.
Name	Displays the name of the opportunity record.
Account	Displays the account (for example, a customer or prospect) associated with the opportunity.
Amount	Displays the revenue amount of the opportunity.
Close Date	Displays the expected close date of the opportunity. You can predefine the number of days to add to the application date when determining the default opportunity close date. The close date defaulting logic follows this precedence. • If set, use the Close Window value on the sales method • Or else, use the value of the Opportunity Close Date Default (MOO_DEFAULT_CLOSE_WINDOW) profile option • Or else, leave the Close Date blank
Sales Stage	Displays the sales stage of the opportunity. The sales stages divide the opportunity sales cycle into sales stages such as: • Qualification • Discovery • Presentation • Agreement • Negotiation • Closed You can employ your company's sales methodology using a sales method that's automatically associated with the opportunity when it's created. The sales method contains several sales stages that salespeople progress as the opportunity matures.
Primary Contact	Displays the primary contact associated with the opportunity. You can specify a contact's role, affinity, and influence level on an opportunity. Note: The contacts panel indicates the Do not Email and Do not Call status of the primary contact if your sales administrator has selected to display this feature.

Opportunity Record Actions

Here are the actions you can take from the opportunity Actions menu (three horizontal dots icon):

- Add Products
- Create Task
- Create Appointment
- Create Note
- Save and Run Assignment
- Send Email

Access these opportunity record actions from the Action Bar.

Add	Update	Filter	Action
• Add Contact • Add Competitor • Add Lead • Add Products • Add Partner • Add Team Member	• Update Account • Update Close Date • Update Name • Update Owner • Update Primary Contact • Update Sales Channel • Update Status • Update Stage • Update Win Probability	• Filter All Communication • Filter Appointments • Filter Email Communication • Filter Field Changes • Filter Notes • Filter Phone Communication • Filter tasks	• Attach • Call • Copy Opportunity • Delete • Log a Call

Create an Opportunity

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

You can create an opportunity in several ways:

- Create an opportunity from the home page.
- Create an opportunity from an account record.
- Create an opportunity from a lead conversion.

You can also create an opportunity from any opportunity saved search list.

Create an Opportunity from the Home Page

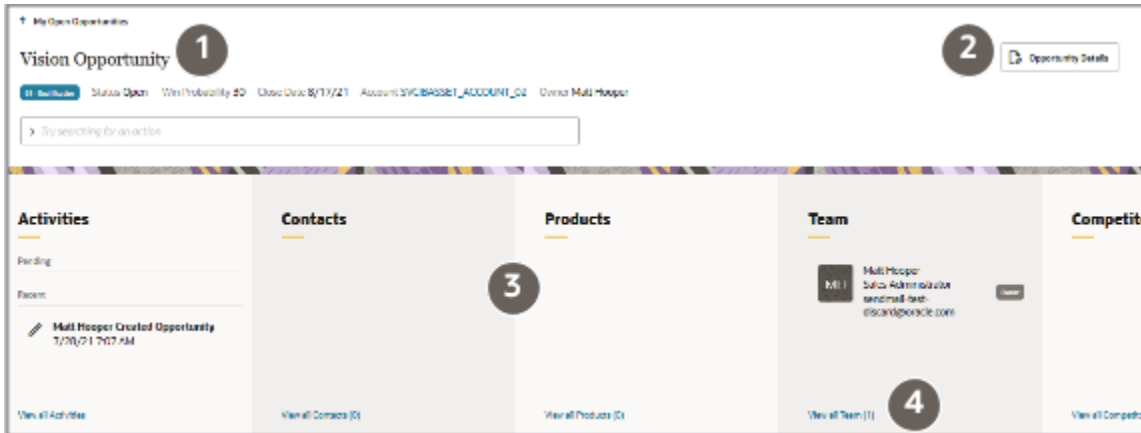
1. On the home page, click **Create Opportunity**.
2. In the Create Opportunity page, enter the opportunity name in the **Name** field.

The opportunity name is the only field required to be filled out when creating an opportunity. Note, however, that the name and sales account combination must be unique. In other words, you can't have two opportunities with exactly the same name and associated to the same sales account.

3. In the **Accounts** drop-down list, select the account that you want.
4. Select the primary contact for the opportunity. Your selections are filtered by the account you selected.
5. Change any of the defaulted information.
6. Click **Create**.

You can now take any of the available actions on the newly created opportunity (callout 1). For example, you can click **Opportunity Details** (callout 2) to edit the fields on the opportunity record. In the fold panels area (callout 3), you can view the details (callout 4) for the following opportunity sections:

- Activities
- Contacts
- Products
- Teams
- Competitors
- Leads
- Partners
- Deals



Create an Opportunity from an Account

By creating an opportunity from the account record, the account information gets entered into the opportunity for you. By starting with the account, you get to review all of the past opportunities and interactions with the customer.

1. On the home page, click **Account**.
The page displays My Accounts, listing all of the accounts where you're on the team or territory.
2. If you're not sure place your cursor in the search bar and select a different saved search. Selecting All Accounts or deleting all of the filters for a search, lets you search all the accounts you can view.
3. Enter the name of the account in the Action Bar.
4. Open the account record from the search results.
5. In the Action Bar, enter: `create opportunity`
6. In the Create Opportunity page, enter an opportunity name change any of the defaulted information.
7. Click **Create**.

Create an Opportunity by Converting a Lead

When creating a lead, if the account you're looking for doesn't yet exist in your application, you have the option of either creating the account record or you can store the account name as text. If you store the account name as text in the lead, the account record gets created only when the lead is qualified and converted to an opportunity.

1. On the home page, click **Leads**.
2. Select My Open Leads to list the leads that you own or are a member of the team or territory.
3. Select the lead that you want to convert to an opportunity and from the actions menu select **Convert**.
4. In the Convert Lead section of the page, change any of the defaulted information. For example, the Opportunity Name field defaults to the lead name so you can change this if you want.
5. Click **Submit**.
6. Click **Opportunity Detail** where you can view and edit the details of your recently created opportunity.

Add an Attachment to an Opportunity

You can add files and URLs as attachments to opportunities. To view and add attachments, enter "Attach" in the Action Bar and press Return.

Close an Opportunity

Salespeople can close an opportunity when the deal is either won, lost, or abandoned for some reason by setting the opportunity to a closed status.

By default, the application sets the close date to 20 days after an opportunity is created. Your administrator can enter a different close period when setting up your sales method. When defining a sales method, they can insert an average close window value in days which sets the default close date of opportunities for the sales method.

Closing an Opportunity

You can close opportunities as needed, for example, when they're won, lost, or no longer active. When closing an opportunity, you may be required to enter a win/loss reason and a competitor, if enabled during setup.

Select Close Date from the Action Bar to set the calendar period for the opportunity close date. Predefined values are This Quarter, Last Quarter, Next Quarter, This Year, and Last Year. When you set a value in this field, the opportunity list page displays all opportunities for the dates of the selected calendar period.

My Open Opportunities

Close Date: Bottom: Today — Next 200 Days / Status: Equals: Open / Abandon: Not in View

Search:

Sales Method: Standard Sales Process / Group By: Sales Stage

Close Date	Sales Stage	Primary Contact
12/1/20	01 - Qualification	bon benzon
12/1/20	01 - Qualification	Helen Test1
12/1/20	01 - Qualification	Helen Test1
12/1/20	01 - Qualification	Gabriel Collins
12/2/20	01 - Qualification	Gabriel Collins
12/2/20	01 - Qualification	Auto_DSOpty...

Here's an example of using the Close Date field to retrieve opportunities whose close date falls within a specific date range:

- You want to review opportunities for a 5-month range: March 1 through July 31, 2020.
- In the Close Date fields, you enter 03/1/2020 to 7/31/2020.

Here's how to close an opportunity from the Edit Opportunity page.

1. Sign in as a salesperson and navigate to **Digital Sales > Opportunities**.
The opportunity landing page displays the list of your opportunities.
2. Find an opportunity and click **Opportunity Details** to edit it.
3. From the **Status** field, select a status that belongs to a Closed status category. For example, select **Won**.
The **Close Date** field changes to the current date.

The **Comments** field becomes active where you can enter your comments about the opportunity.

4. Click **Save**.

Tip: You can find closed opportunities by searching for them using the Action Bar.

Use Group By and Custom Aggregations for Opportunities

You can display search results in groups based on the specific fields on your opportunities. View an overview of the number of records in each Grouped By grouping and search and filter records within these groupings.

You can also view aggregates such as count, average, minimum, maximum, and sum of values on the records of each group. Count aggregations are available on each group by default.

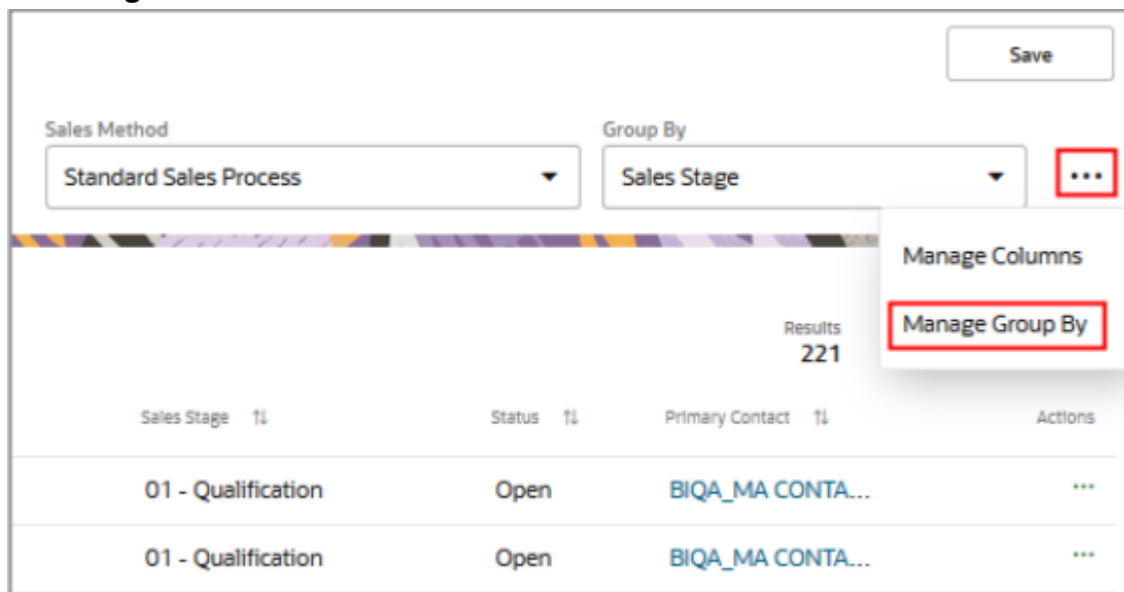
Manage Opportunity Group By Field

Use **Group By** to view opportunities arranged into groups for various stages of the pipeline. You can view data aggregates for each group, such as grouping opportunities by month and viewing the total revenue for each month.

Here's how to apply aggregations to your grouped by opportunities.

Click **Manage Group By** (the pencil icon on the right of the opportunity page highlighted in the screenshot).

1. Access **Manage Group By** by clicking the Action menu (3 horizontal dots icon) on the right of the **Group By** field highlighted in the screenshot. You can also change which columns are displayed on the page by selecting the **Manage Column** item.



2. Click **Manage Group By** to open the Manage Group By page where you can define the aggregation you want.
3. Select the **Aggregate Field** and **Aggregate Function** that you want to apply to your aggregation.
4. Click **Apply**.

View Team and Territories Associated with an Opportunity

From the Team foldout panel for Opportunities, you can view details for a combination of all team members and territory team members associated with an Opportunity.

For example, for each member (resource) of the combined opportunity and territory team, the following information is displayed:

- Image or Initials of the resource
- First and last name
- Email address hyperlink 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 opportunity. 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 opportunity record.

- Resource Role/Function, Territory Name, Type, Owner and other details to suit your requirements.

You can use Visual Builder Studio to expose and modify the resource, opportunity team and territories information shown in the opportunity team foldout panel and page.

- City, State, Country (code)

Note: If you want to add additional fields to the Digital Sales UIs, then you must use VB Studio instead of Application Composer. For an example, see "Add a Custom Field to the Edit Contact Page" in the Oracle Fusion Cloud Sales Automation Extending Digital Sales (Next Gen Sales) guide. To access this guide, contact your Oracle representative.

You can also easily identify the owner of the opportunity through the Owner badges. In addition, the Territory Owner badge indicates the owner of the territories assigned to the opportunity record.

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.

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↑ My Open Opportunities

Pinnacle Tech Licenses: Team

01 - Qualification

Status Open

Win Probability 0

Close Date 9/25/22

Account Pinnacle Technologies

Owner Waternoose, Henry

Try Add Campaign

Go to Overview

Name	Role	Phone	Email	Location	Territory	Territory Type	Opportunity Owner	Territory Owner	Access	Actions
Michael Rogers			sendmail-test-discarc		NA Eastern Region	Prime	No	Yes		...
Mateo Lopez	Sales Manager	998 5240	sendmail-test-discarc	Sacramento, US	NA Western Region	Prime	No	Yes		...
Lisa Smith	Salesperson	5558355	sendmail-test-discarc	New York, NY, US			No	No	Edit	...
Lamott, Julius	Salesperson		sendmail-test-discarc		QMQA for OL 1	Prime	No	Yes		...
Joe Buendia	Sales Vice President		sendmail-test-discarc		Japan	Prime	No	No		...
Joe Buendia	Sales Vice President		sendmail-test-discarc		CDRM_TER2_AC_평택사	Prime	No	Yes		...
Jerry Weinberg			sendmail-test-discarc		APAC Child1	Prime	No	Yes		...
Jenna Hunterson	Sales Manager		sendmail-test-discarc		APAC Inside Sales - East	Overlay	No	Yes		...

Owner Forecasts

Your quarterly forecast for opportunities you own is available in **Digital Sales > My Forecast**.

Here's how your forecast is generated:

- The opportunities are placed in a quarter according to their close dates.
- Revenue for opportunities with a win probability between 0% and 39% is unforecasted pipeline.
- Revenue for opportunities with a win probability between 40% and 59% is accumulated in the Best Case category.
- Revenue for opportunities with a win probability between 60% and 99% is in the Committed category.
- Won deals have 100% win probability and are added to the Won revenue.

Forecast Terminology

This table describes some terminology used in forecasting.

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157

Term	Description
Best Case	Sum of all best case revenue values for all forecast items in the forecast period.
Committed	Sum of all opportunity revenue values that your sales team have committed to close as part of this forecast.
Won	Total won forecast amount for the selected sales forecast period.
Expected revenue	Sum of the total won forecast amount and the total of all opportunity revenue values that your sales team have committed to.
Unforecasted	Any deal with a win probability below 40% and Status Code = 'OPEN. The unforecasted pipeline also includes opportunities that aren't part of the best case, commit, or won categories.
Quota	Set sales quota for salespeople, inline with the organizations strategic goals. Managers can view their quota attainment and those of their team members.

Sales representatives can change the total amount of their own quotas as follows:

1. From the **My Forecast** page, click the pencil icon next to the **Quota** metric card.
2. Change the quota total as required and click the check mark (OK) icon. You can click the X icon (Cancel) to revert back to the original quota amount.

Opportunity Revenue Lines

About 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, which classifies and organizes the products in your catalog. Your sales administrator can include a description for each product group and product and can also upload one image for each product.

The sales catalog is the source for product groups and products in leads, opportunities, contracts, and service requests. Revenue entered for product groups and products drives metrics for sales forecasting and salesperson quota attainment.

Add Products to an Opportunity

You can add products or product categories to an opportunity in several ways. You can either browser 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 foldout subview.

Add Products Using the Foldout Subview

Here's how to quickly add products or product categories to an opportunity from the **Add Products** foldout subview.

1. Open the opportunity you want to update.
2. In the Action Bar, enter **add** and select **Add Products**.
3. From the **Add Products** foldout subview, 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.

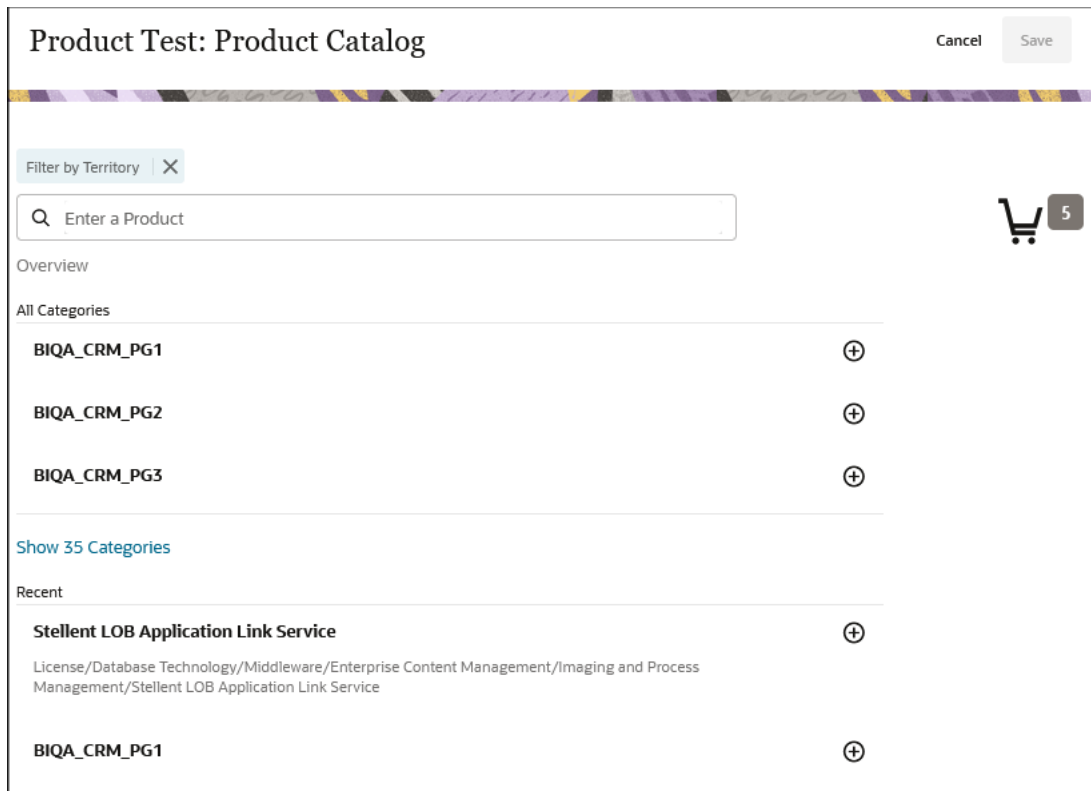
1. Open the opportunity you want to update.
2. In the Action Bar, enter **browse** and select **Browse Catalog**.
3. You can add multiple products or product categories to the opportunity in one of two ways:
 - You can browse the Product Catalog by clicking on product category names. As you browse, you 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:

The screenshot shows the 'Product Test: Product Catalog' interface. At the top, there is a 'Filter by Territory' button and a search bar labeled 'Enter a Product'. Below the search bar, the breadcrumb 'Overview > Cart' is visible. The main part of the interface is a table with the following columns: Product Type, Product, Quantity, Estimated Price, Amount, Sales Credit, and Actions. The table contains five rows of data. The last row, which is highlighted in blue, shows a 'Group' product named 'BIQA_CRM_PG1' with a quantity of 1 and an amount of \$ 0. A red rectangular box is drawn around the 'Actions' icon (three horizontal dots) in the last row of the table.

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**.

View and Assign Sales Credits to Revenue Lines and Split Credit

Sales credit recipients and revenue amounts roll up the resource hierarchy for pipeline reporting and quota attainment.

You assign sales credits to sales resources (salespeople or other sales users) while editing product lines in opportunities. When a product line is first added to an opportunity, the application sets the user who added it as the sole sales credit recipient. This means that the sole recipient receives 100 percent of the sales credit.

View Who Gets Credits for Revenue Lines

There are two types of sales credit: Revenue sales credit is allocated to salespeople working the deal, while overlay sales credit, also known as nonrevenue sales credit, is split and allocated to other resources helping out with the deal, such as a product or market specialist. You can find out who is getting credit for revenue lines by clicking the Sales Credit (the person icon) in a revenue line.

Here is a sample screenshot of the portion of the Opportunity: Products page when you hover over the Sales Credit icon to view split sales credits for both revenue and overlay credits:

Amount ↑↓	Edit	Actions
\$ 1,000		...
\$ 75		...
\$ 599		Revenue Credit Matt Hooper 50%
\$ 550,000		ZSF Sr_Sales_Mgr 50% Overlay Credit No items to display.

Assign Sales Credits to Revenue Lines

You can allocate and manage sales credit amounts that opportunity team members receive.

Here's how to add or edit the Revenue Credit and Overlay Credit receivers and assign percentage sales credit:

1. Navigate to **Digital Sales > Opportunities**.

The opportunity landing page displays the list of your opportunities.

2. Select the opportunity you want and, from the **Products** pane, click the **View all Products** link to go to the Products page.

- Click the Sales Credit icon to assign or modify percentage sales credits to new or existing Revenue Credit and Overlay Credit receivers.

Software Pack A

Total Amount: \$ 3,764,817

Revenue Credit (1) Overlay Credit (0)

+ Add Revenue Credit

Locked	Name	Credit Percent	Credit Amount	Territory	Actions
	Mike Wazowski	100%	\$ 3,764,817		...

Cancel
Done

- Click the **Revenue Credit** and **Overlay Credit** tabs to add or edit a revenue or an overlay credit (split credit) receiver.
- Once you're done modifying the sales credit details, click **Save** (check mark icon) on the revenue line (row) to save your changes.
- Click **Done** when finished adding your sales credits.

About Recurring Revenue Schedules

Opportunities support a product revenue model that features revenue-based forecasting, products and product groups, recurring revenue, and revenue data captured at the line level.

For example, recurring schedules in opportunities let you enter and track opportunity products or product groups that are part of a subscription business model. The subscription business model applies to the sale of goods, software, or services where the customer is required to pay a subscription price for access to the goods, software, or services, with additional usage or pay-as-you go charges in some cases.

Note: Recurring opportunities functionality is available only if your administrator has enabled it.

Create and View Revenue Schedules on a Revenue Line

You use recurring transactions to enter and track opportunity products or product groups that are part of a subscription business model.

Here's how to create a recurring revenue schedule for a product or product group in the opportunities UI.

- 1. Navigate to **Digital Sales > Opportunities**.
- 2. Edit an opportunity by clicking the name in the list. Or, create an opportunity and save and edit it.
- 3. In the Edit Products page, enter the details about the product or product group.

Edit Product

Product Type Group	Product Group8000RT Servers
Quantity5	Estimated Price\$ 50
Recurring Revenue\$ 250	Usage Revenue\$ 0
Line CurrencyUSD	Win Probability90

- 4. Enter the data into the fields, using the guidance in this table.
Depending upon how your application is configured, you may have additional product line attributes available.

Field	Guidance
Price Type	Enter a category that describes the price, such as recurring, nonrecurring, or usage revenue.
Quantity	Enter quantity of the product or product group being sold, as a whole number.
Estimated Price	Enter the amount of the product or product group being sold.
Recurring Revenue	Enter the recurring revenue for the revenue line.

Field	Guidance
Nonrecurring Revenue	Enter the non-recurring revenue for the revenue line.
Usage Revenue	Enter the usage revenue for the revenue line.
Amount	Amount used in forecasting and for reporting. The application calculates this field by adding recurring, nonrecurring, or usage revenue totals.
Line Currency	The initial value is based on the opportunity-level currency. If multiple currencies are implemented, you can pick a different currency.
Win Probability	The initial value is the opportunity-level win probability.
Close Date	Indicates the expected close date of the product line. The initial value is the opportunity-level close date, but each line can have its own close date

5. Click **Add Schedule**, and the Schedule section displays. Here's a sample screen shot:

Product

Product Type Group

Product Group
8000RT Servers

Price Type
Recurring

Quantity
5

Estimated Price
\$ 50

Nonrecurring Revenue
\$ 200

Recurring Revenue
\$ 250

Usage Revenue
\$ 0

Amount
\$ 450

Line Currency
USD

Win Probability
90

Close Date
03/02/22

Schedule

Frequency
Monthly

Recurring Quantity
5

Recurring Revenue
\$ 250

Nonrecurring Revenue
\$ 200

Usage Revenue
\$ 0

☐ Divide Amount by Transactions

Start Date
03/02/22

☐ End By

☒ End After

12

Transactions

6. Enter the required data into the fields, using the guidance in this table:

Field	Guidance
Frequency	Select a frequency that the revenue should be generated for. Note that: ○ Bi-Weekly is twice a month (every two weeks) ○ Bi-Monthly is every other month
Divide Amount by Transactions	Select this check box if you want the amounts to be divided by the number of transactions based on the set schedule.
Start Date	○ The default date is opportunity close date. ○ You can update the field to any other value (equal to or later than current date).
End By	Enter either the number of transactions or a calendar end date, depending on what radio button you selected. Note: The number of transactions to include in your recurring revenue schedule for a product or product group should not exceed 500.

7. Click **Generate Schedule**.

The appropriate number of transactions is created based on frequency, start date, and number of transactions or end date.

- The close date on each transaction is set to a value derived from the combination of frequency, start date, and end date.
- Quantity and amount are repeated for each transaction.
- Other values (like status, win probability, product, currency, and so on) are cascaded from the parent revenue line.
- Transactions are ordered by ascending close date, by default.
- Total quantity and amount are displayed for the schedule. Total amount shows the applicable currency symbol of the product currency.

8. Review the transactions in the schedule and adjust if required.

For procedures on managing recurring opportunity products or product groups that are part of a subscription business model, see the related topics.

Related Topics

- [Overview of Recurring Opportunity Products](#)
- [Create and Maintain Recurring Opportunity Products](#)
- [Manage Opportunity Products and Revenue](#)

How can I see who's receiving sales credit for my opportunity?

If your sales administrator has enabled the credit receiver record set of values, then you can find out who is receiving sales credits from the Revenue Lines list view page. You can search opportunity records using the **I or my subordinate am a credit receiver** and **I am a credit receiver** record set values.

These record sets are predefined but they must be enabled before you can use them in Digital Sales.

- **I or my subordinate am a credit receiver** returns records where the signed in resource or their subordinate is a credit receiver for the opportunity.

This allows sales managers and sales VPs to view the revenue lines for their entire team and see who's receiving credit.

- **I am a credit receiver** returns records where the signed in resource is a credit receiver for the opportunity.

Note: Keep in mind the following prerequisites to assign sales credits in opportunities:

- Territories have been set up and your company is using territories for assignment of opportunity products.
- You must have Full access to the opportunity to assign sales credits.

Related Topics

- [Enable Credit Receiver Record Set Values](#)

14 Web Conference

About Web Conferences

If you have enabled web conference integration for your sales organization, you can start or schedule a web conference meeting, such as a Zoom meeting, from within your sales application. Other web conference providers will be supported in future releases.

Here are some of the benefits of using web conferences in your application. You can:

- Schedule a web conference meeting in context of an account, contact, lead or opportunity
- Add multiple contacts and resources to a web conference meeting
- Start a scheduled web conference meeting using contextual actions, such as the action to **Start meeting** presented for an Appointment record in the activity feed
- View web conference interactions as part of the activity feed of the respective objects such as account, contact, lead, and opportunity

Here's an example of a pending web conference meeting from your Opportunity: Activities page.

↑ My Open Opportunities

Next: Visakh Opportunity

DS_Opportunity_1109_001: Activities

Opportunity Details

81 - Qualification Status Open Win Probability 90 Close Date 29/11/21 Account HDFC Bank Owner Matt Hooper

> Try searching for an action

Go to Overview

Earlier Today November 23, 2021

test_web_conf

Owner: Matt Hooper

23/11/21 5:30 PM 23/11/21 6:30 PM

November 14 - November 20

Matt Hooper Updated Opportunity Detail

The Amount changed to 123456

Matt Hooper Updated Opportunity Detail

The Amount changed to 123456

Matt Hooper Updated Opportunity Detail

The Amount changed to 1.234567891234598e+23

Create a Web Conference Appointment

Here's how to create and schedule a web conference meeting from the Create an Appointment page.

1. Navigate to the appropriate work area for the object you want.
2. In the landing page, find the account that you want in the list and select Create Appointment from the Actions menu.

Note: While you're viewing an individual record, you can instead enter "create" in the Action Bar and select the Create Appointment action from there.

3. Enter the basic details about the appointment and in the **Type** field, select **Web Conference**.
4. Expand **Appointment Details** and add the contacts and resources you want to add as participants to the web conference appointment.

Note: The first contact you add to an appointment is marked as the primary contact. After you add more contacts, you can designate a different contact as the primary contact.

The primary contact on the record and the owner of the record are invited automatically in addition to any other contacts you added.

5. Click **Save**.

If web conferencing is enabled, a meeting is created and the meetings details, meeting ID, and URL is automatically displayed on the appointment details area. In addition, the web conference appointment displays as pending on the activities list for your account, contact, lead, or opportunity.

Manage My Web Conference

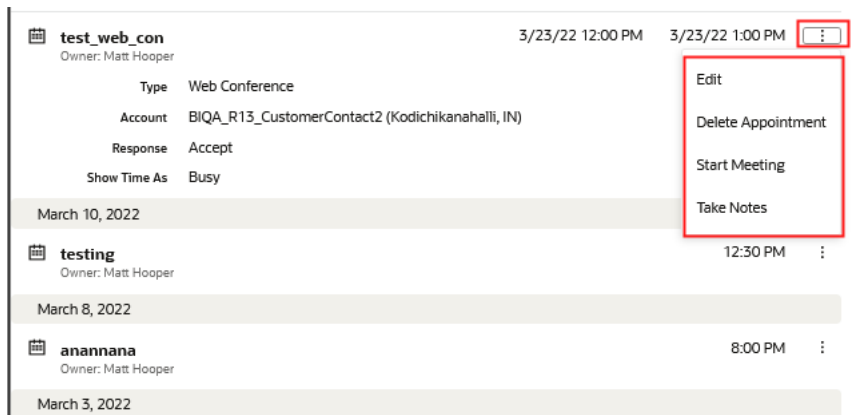
You can edit and delete an appointment of type Web Conference. For example, you might want to add or remove participants, change the scheduled date and time, or modify the meeting contents.

Edit Web Conference Details

Here's how to edit the details of a pending web conference meeting.

1. From the Activities page, select the meeting that you want to modify.

2. Click **Actions > Edit** (the Actions menu is the icon with the three vertical dots).



3. Make your changes and click **Save** when done.

Only changes to the appointment owner, time, and subject are updated on the corresponding web conference meeting.

Add or Remove Web Conference Participants

When you create a web conference type appointment, the Primary email address is used for both contacts and resources (sales team members). You can add additional contacts and resources when initially creating your web conference or you can add or remove them from your pending web conference. You can also change a contact and mark a different contact as a primary contact. Likewise, you can add resources to the web conference and mark as owner.

Here are the steps to add or remove participants to your web conference.

1. From the Activities page, select the web conference appointment that you want to modify.
2. Click **Actions > Edit** and expand the **Appointment Details** section.
3. From the **Contact – Actions** menu (the Contact-Actions menu is the icon with the three horizontal dots), you can select from the following contact lists:
 - o All Contacts
 - o My Business Contacts
 - o My Contacts

The following are automatically included as participants.

- o Primary contact of the Lead, Opportunity, Account, or the Contact's primary email address
 - o Owner of the Lead, Opportunity, Account, or Contact if different from the signed in user
4. Select additional contacts that you want to participate in or remove from the web conference. You can also choose to mark a contact as your primary contact.
 5. Next, select any additional resources that you want to include, remove, or change.
 6. Click **Save**.

Note: If you have enabled the setting to send a meeting invite via email, the web conference meeting URL link and invite details are sent to all invitees. You can add invitees (participants) while scheduling a web conference meeting. You can also invite additional participants while the meeting is ongoing.

Delete a Web Conference

You can delete a web conference appointment that hasn't yet started. You can also delete a web conference meeting that has already started but a warning dialog is display for you to confirm that you want to delete the appointment.

1. From the Activities page, select the web conference meeting that you want to delete.
2. Click **Actions > Delete Appointment** to remove the corresponding web conference meeting.

Start a Web Conference

If you have access to the Account, you can view all feed items (pending, ongoing, or completed meetings) and can both start or join a web conference. Here's how.

1. Locate and select the Web Conference appointment in the Activities page.
2. Click **Actions > Start Meeting** to start the corresponding web conference meeting.

If you are the meeting host, then you should receive a notification that participants have joined the web conference and are waiting for the host to join. This depends on what interested events you subscribed to receive Webhook notifications for your app during setup.

Note: If the web conference unexpectedly ends or the call drops for some reason, then you can start the meeting again from the Activities area of your sales application.

Once the meeting host has started the meeting, anyone who has access to the web conference appointment record can click **Join** to attend the web conference.

Add Notes During an Ongoing Web Conference

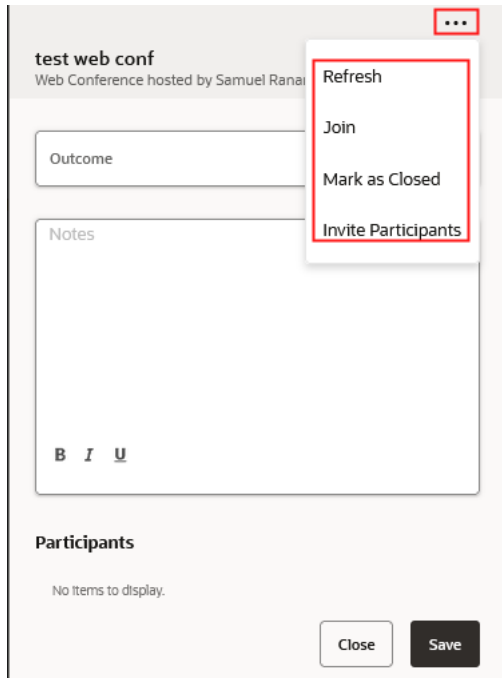
The user hosting the meeting or any participant who has joined a meeting can add notes such as meeting minutes to the web conferencing meeting or add action items while the meeting is in progress.

Here's how.

1. Locate and select the Web Conference appointment in the Activities page.

2. Click **Take Notes** and a communications panel as shown opens to the right of your screen.

Note: The communications panel lets you and other participants take notes about the on-going web conference. The panel remains in place while you continue to perform other tasks and remains open after your web conference ends.



Note: If you are the meeting host and if you started the meeting from your web conference provider, such as Zoom, and then later open the parent record, you can either click the communications panel header or click the expand icon to open a different panel to take notes for your meeting.

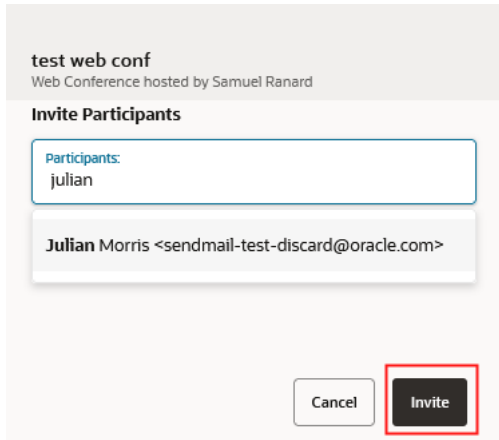
Once other participants join, they can also add notes so ensure that you click **Save** after entering some notes periodically. Click **Refresh** to ensure you're viewing or editing the latest version of the meeting notes.

Invite Participants

Once you have started the meeting for all participants, you can invite additional participants while the meeting is ongoing.

1. From the communications panel, click the Actions menu (3 horizontal dots icon) and select **Invite Participants**

2. Add the participants you want to invite to the ongoing web conference as follows:



3. Click **Invite**.

Wrap Up a Web Conference

Here are the steps to wrap up and give an outcome of your web conference.

1. Insert the final comments agreed at the meeting in the communications panel.
2. Select an outcome from the **Outcome** drop-down list. You can select from one of the following list of outcomes:
 - Left message
 - Positive outcome
 - Provided information
 - Answered question
 - Call answered
 - Known issue
 - Documentation issue
 - At risk
3. Click **Save**.
4. Click **Mark as Closed** to set the interaction status to closed.

Note: You can click **Close** to dismiss the communications panel at any stage. You can reinstate the panel by expanding an ongoing communications panel or performing the **Take Notes** or **Start Meeting** actions.

Microsoft 365 Integration

How can I create a web conference meeting?

If you're the organizer of the meeting and have the meeting link populated in the location field of the invite, you can start the meeting from Next Gen Sales.

Here are the details:

When you create a Zoom meeting in Outlook, the location field is populated with a meeting link. Here's a screenshot that highlights the Location field of a Zoom meeting instance created from Outlook.

The screenshot shows a Zoom meeting invitation form. The 'From' field is 'Jenn@oracle.com' and the 'Title' is 'Zoom meeting invitation'. There are 'Required' and 'Optional' checkboxes. The 'Start time' is 'Mon 7/25/2022' at '7:30 PM' in 'Chennai, Kolkata, Mumbai'. The 'End time' is 'Mon 7/25/2022' at '8:00 PM' in 'Chennai, Kolkata, Mumbai'. There are checkboxes for 'All day' and 'Time zones', and a 'Make Recurring' button. The 'Location' field is highlighted with a red box and contains the URL 'https://oracle.zoom.us/j/...'.

After you send the invite to the recipients and the meeting is shared with the sales application, you see the meeting in the feed of the appropriate object in Next Gen Sales.

Start your meeting from the sales application and take down notes. To learn more about that, see the [Start a Web Conference](#) topic.

Note: Same as Zoom, you can start the Google and WebEx meetings as well from Next Gen Sales. You just need to add the appropriate meeting link in the Location field.

