Oracle Fusion Cloud Sales Automation

How do I get started with the Sales Catalog?

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1 How do I get started with the Sales Catalog?

Overview of the Sales Catalog

Salespeople enter the products or product groups that customers are interested in purchasing by making a selection from a sales catalog. They can either browse the catalog or start typing the product name to begin to associate products or product groups with business objects like opportunities and leads.

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

In addition:

- The catalog you create has a root product group that you build your catalog underneath.

  > **Note:** The root product group is a placeholder for product managers to organize their sales catalog hierarchy. The root catalog typically isn't a sellable product. It's a placeholder used to traverse and list the product hierarchy in the product lists of values. In Oracle Sales in the Redwood UX, the root product group doesn't display in the UI like it does in classic Oracle Sales.

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

Using Products in the Sales Catalog

While you can create the sales catalog with only product groups, you must use products to take advantage of advanced sales features and to enable integrations with other Oracle cloud services, including Oracle Subscription Management and Oracle Configure, Price, and Quote (Oracle CPQ). These two products are key components in the *Oracle Revenue Transformation Solution*.

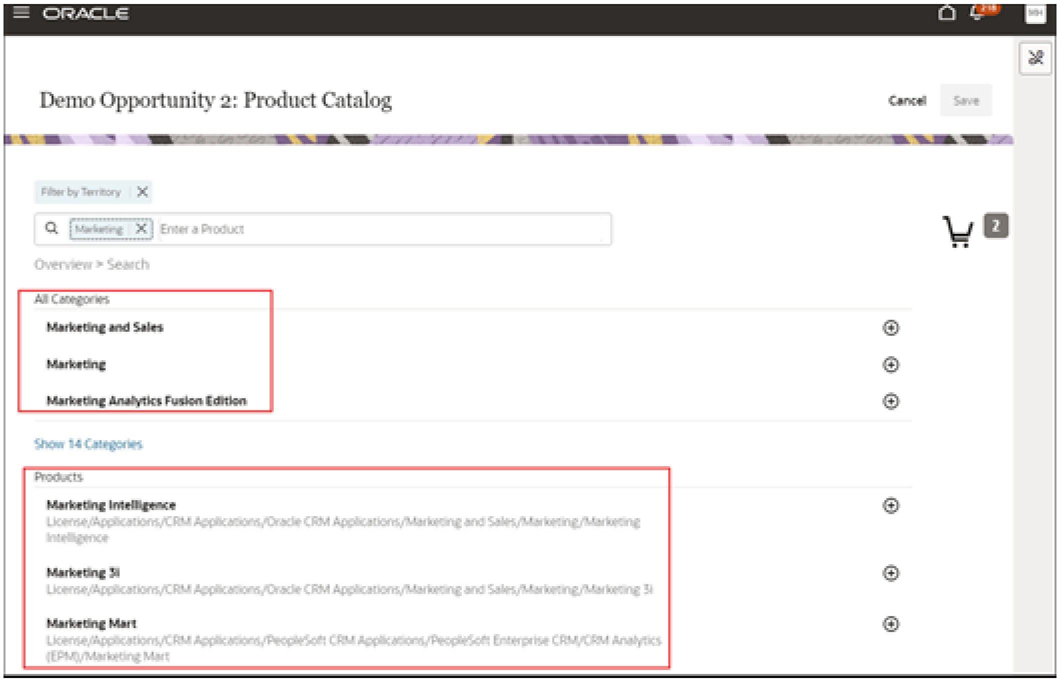
You can also use Application Composer to add fields and perform other modifications to products, a feature not available on product groups.

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

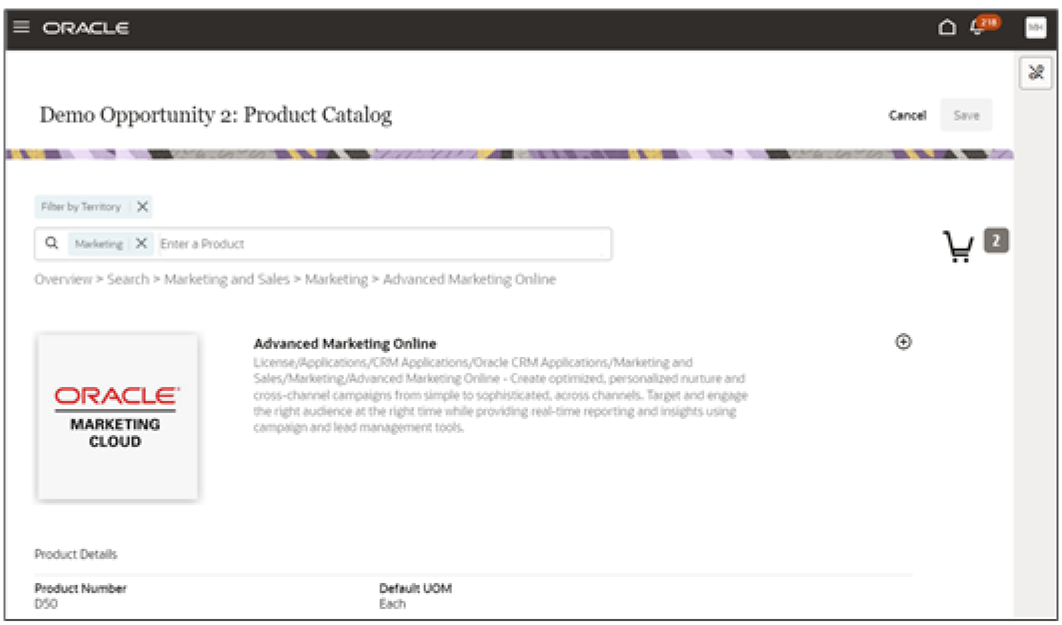
Sample Sales Catalog Flow and Structure

In Oracle Sales in the Redwood UX, salespeople add products within a business object like opportunities or leads by using the search bar. As they start to type, for example, "add product", the appropriate action appears for them to select. After they select the action, Add Products dialog appears where they can select and add products.

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



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



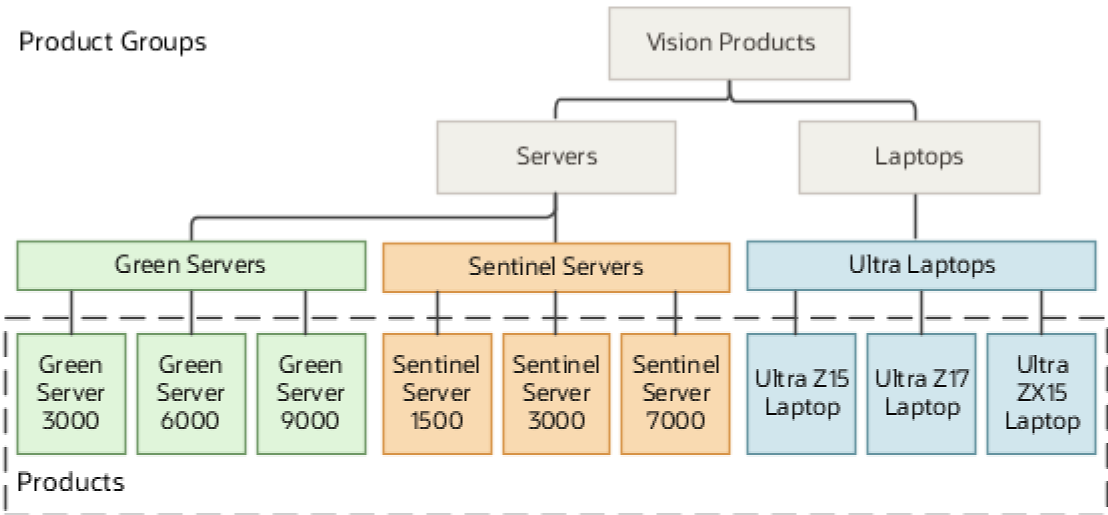
For example, the fictitious Vision Corp. uses product groups to assign specialists to help close deals on opportunities. They use a line of servers that the company has just launched. The company also creates forecasts for each server line.

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

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

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

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



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

Sales and Service Catalogs

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

There are two differences between sales and service catalogs:

- How product groups are used.

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

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

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

Products in the Sales and Fusion Service Catalogs

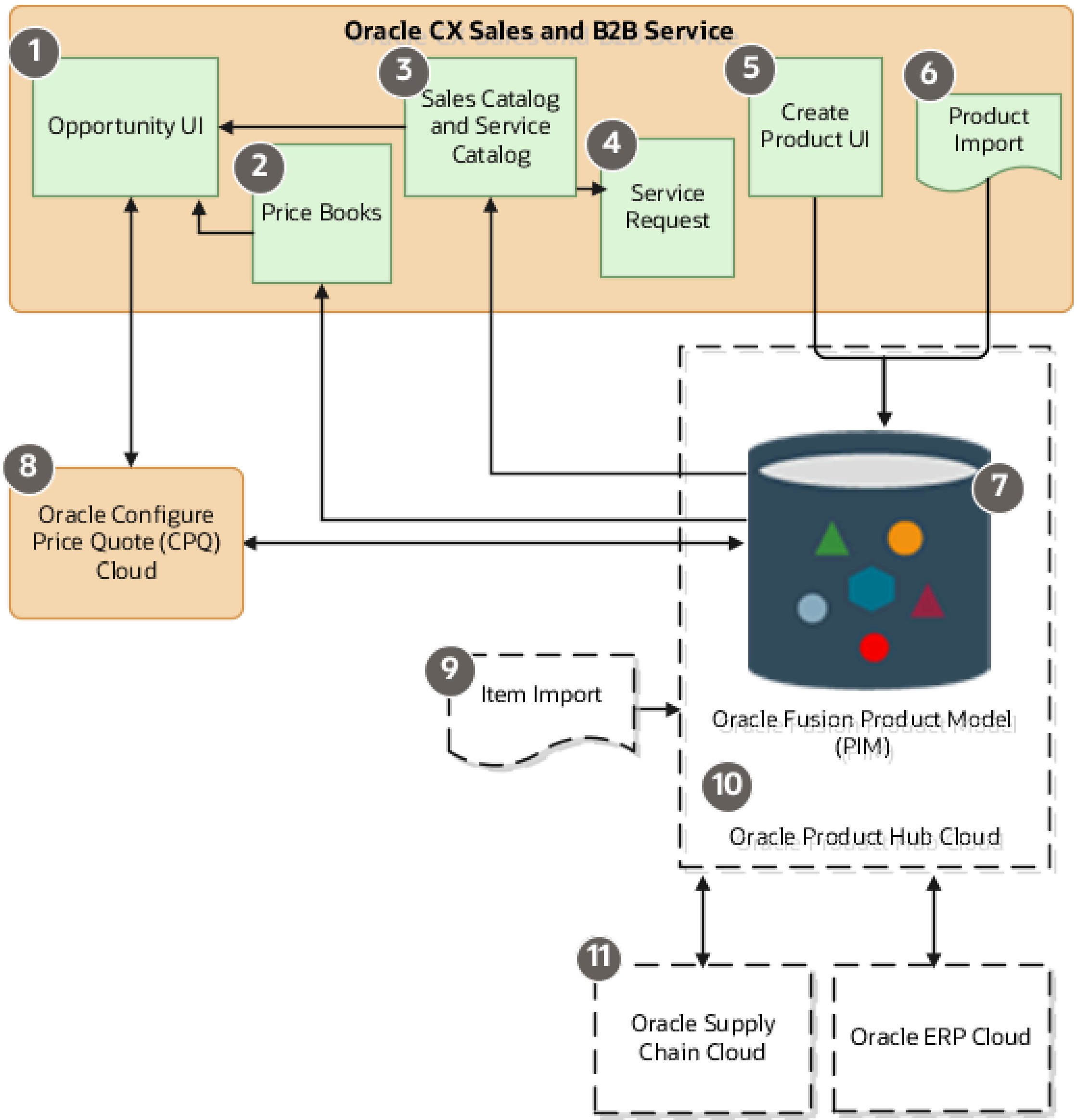
While you can create sales and service catalogs with product groups only, you must create products to take advantage of advanced sales features such as price books. You must also use products to enable integrations with other Oracle cloud services, including Oracle Configure, Price, and Quote (CPQ) Cloud.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

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

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

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

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



Related Topics

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

Overview of Sales Catalog Setup

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

The Setup Assistant:

- Creates the root product group.

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

Sales Catalog Setups to Do Manually

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

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

Description	Where to Find More Information
Step 1 Review the units of measure to make sure you have all you need.	*Review Units of Measure (UOMs) for Products*
Step 2 Obtain the reference number for the root product group Setup Assistant created for you. You need the reference number to create the link between the root and the product groups you import.	*Get the Reference Number for the Root Product Group*
Step 3 Enter the product group hierarchy information.	*Import Product Group Hierarchy Information*
Step 4 Validate the sales catalog on the Manage Product Groups page.	*Validate the Sales Catalog*
Step 5 If using classic Sales, enable browsing of the sales catalog while editing opportunities by setting the profile option Browse Sales Catalog in Opportunities Enabled. There's no setup needed to set up the browsing of the catalog in the Redwood UX version.	*Enable Sales Catalog Browsing in Opportunities (Classic Sales Only)*
Step 6 Sign in as a sales user and validate that your sales catalog shows up in opportunities.	*Validate the Sales Catalog*
Step 7	• *Territory Filtering of Products in the Catalog*

Description	Where to Find More Information
Let salespeople filter the catalog display by only their own territories or with products or product groups from all territories they have access to.	• *Set Territory Filter Options*

Review Units of Measure (UOMs) for Products

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

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

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

Validate the Sales Catalog

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

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

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

Sales Catalog High-Level Setup Steps

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

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

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

<table>
<tr><th>Description</th><th>Where to Find More Information</th></tr>
<tr><td>Step 1
Ensure that your prerequisite structures are set up before starting to create the catalog.</td><td>Prerequisite Setups for Sales Products</td></tr>
<tr><td>Step 2
Create the root product group. The root catalog or root product group is the top of the product group hierarchy. All other product groups are nested underneath.</td><td>Create the Root Product Group</td></tr>
<tr><td>Step 3
Add additional product groups to create the catalog hierarchy of product groups and subgroups.

Once your hierarchy is set, you can add the product groups manually in the product groups pages, or you can import them. Importing products lets you use quick import macros or Import Management to create the entire product group and product hierarchy all at once.

Note: If you're not integrating with an order management application or doing quoting, you can simply use a product group hierarchy without products. There's no need to use individual products unless you need to for downstream applications.</td><td>• Create the Product Group Hierarchy
• Options for Importing Data Into Your Application</td></tr>
<tr><td>Step 4
If you're going to use individual products in the catalog, add products to the application. You can create products using the sales Products UI or the product model available with Oracle Supply Chain Management Cloud.

You can also import products and the product hierarchy all at once. Or, you can use Import Management to import products and the hierarchy.</td><td>• If using the sales Products UI, see Create Products Manually in the UI.
• If using Oracle Supply Chain Management (SCM) Cloud product model see these guides:
◦ Oracle SCM Cloud Implementing Product Management
◦ Oracle SCM Cloud Using Product Master Data Management
• Options for Importing Data Into Your Application</td></tr>
<tr><td>Step 5
If you're going to use individual products in the catalog, add products to the product group hierarchy.</td><td>Add Products to the Catalog</td></tr>
<tr><td>Step 6
Publish the product group hierarchy that makes up the sales catalog. Perform this step in the product groups pages in Setup and Maintenance.</td><td>• Publish the Sales Catalog
• Run the Refresh Denormalized Product Catalog Table</td></tr>
</table>

Description	Where to Find More Information
When you publish a catalog, the scheduled process, Refresh Denormalized Product Catalog Table for BI, runs automatically to update the current view of the product group hierarchy in consuming applications.	
Step 7 To enable a sales catalog for use in the applications, you associate it with a "usage" called the Base usage.	*Enable the Sales Catalog by Setting the Base Usage*
Step 8 If you make a new assignment of Base to a root product group, you must run the scheduled process, Refresh Denormalized Product Catalog Table for BI. If you don't run the process, your product group hierarchy might not appear in the consuming applications.	*Run the Refresh Denormalized Product Catalog Table*
Step 9 If using classic Sales (and not the Redwood version), set the profile option, Browse Sales Catalog in Opportunities Enabled, to Yes to enable Browse Sales Catalog button on the Products table.	*Enable Salespeople to Browse the Catalog*
Step 10 Salespeople browsing the sales catalog can sort products and product groups alphabetically after you set a profile option.	*Let Salespeople Sort the Sales Catalog Alphabetically*
Step 11 If you've set up the browse catalog feature (needed only for classic Sales only), configure search and browse options.	*Set Sales Catalog Search and Browse Options*
Step 12 After you've published and enabled your catalog and, optionally, set up browsing, validate your setups.	*Validate the Sales Catalog*
Step 13 You can implement eligibility rules that enable salespeople to check product eligibility in opportunities.	*Set Up Product Eligibility*
Step 14 You can configure whether the sales catalog displays only product groups and products within a user's sales territories, or if it displays all product groups and products defined in the catalog.	*Filter Sales Catalog Display by Territory*

Description	Where to Find More Information
Step 15 You can use the prebuilt Fusion Sales-Oracle Configure, Price, and Quote (Oracle CPQ) integration to let salespeople manage a variety of quote-related activities.	These guides: • *How do I get started with the Oracle Revenue Transformation Solution?* • *Integrating Fusion Sales with Oracle CPQ* guide

Create the Root Product Group

The root product group is a placeholder for product managers to organize their sales catalog hierarchy. The root catalog typically isn't a sellable product. It's a placeholder used to traverse and list the product hierarchy in the product lists of values.

> **Note:** In Oracle Sales in the Redwood UX, the root product group doesn't display in the UI like it does in classic Oracle Sales.

If you're using the Sales Assistant to set up your initial implementation, then the assistant creates the root product group for you. See *Overview of Sales Catalog Setup* for more information.

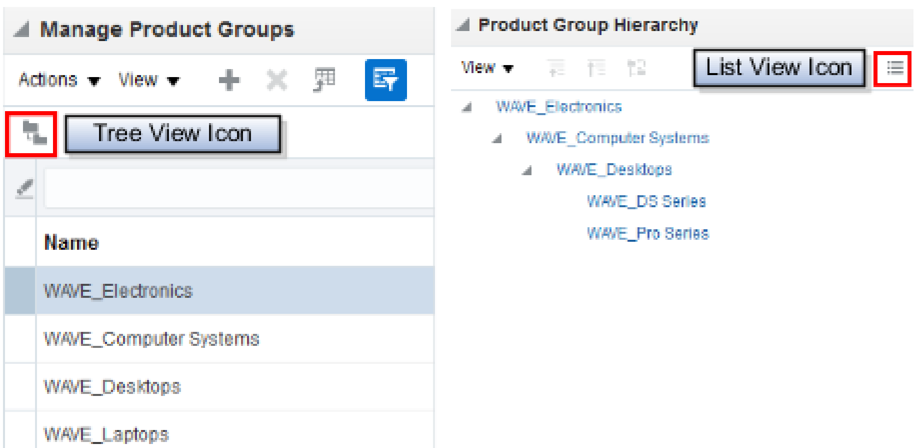
Here's how to create the root product group:

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

Create the Product Group Hierarchy

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

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



2. In the Manage Product Groups page, click the **Subgroups** tab in the main work area.
   The product group information for the selected group appears in the main work area.

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

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

7. Repeat the steps to create additional levels in your sales catalog hierarchy.

Add Products to the Catalog

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

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

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

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

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

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

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

Related Topics

- Overview of Sales Products
- Data Import Options

Enable Salespeople to Browse the Catalog

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

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

1. In Setup and Maintenance, go to:

   - Offering: Sales

- Functional Area: Opportunities
- Task: Manage Opportunity Profile Options

2. Search for:
   - Profile Display Name: Browse Sales Catalog in Opportunities Enabled

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

Publish the Sales Catalog

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

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

Here's how to publish the root group:

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

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

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

Related Topics

- Sales Catalog High-Level Setup Steps

Enable the Sales Catalog by Setting the Base Usage

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

1. In Setup and Maintenance, go to:
   - Offering: Sales
   - Functional Area: Sales Catalog and Products
   - Task: Manage Product Group Usage

2. In the Manage Product Group Usage page, select the Base record. If a product group is already associated with the Base usage in the Details section in the portion of the screen, then you can remove the product group by selecting it and clicking the Delete icon.
3. In the Details section, click the **Select and Add** icon.
4. In the dialog box that appears, search for the root catalog that you just created.
5. Select the record and click **OK**
6. In the Manage Product Group Usage page, click **Save and Close**.

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

Run the Refresh Denormalized Product Catalog Table Process

Every time you publish a catalog, the scheduled process, Refresh Denormalized Product Catalog Table for BI, runs automatically to update the current view of the product group hierarchy in the applications.

In addition, each time you make a new assignment of Base to a root product group, you must run the process. If you don't run the process, your product group hierarchy may not appear in the applications.

Run the Process

Here's how to run the Refresh Denormalized Product Catalog Table for BI process:

1. Sign in as a setup user and navigate to **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog window, click the down-arrow next to the **Name** field and click **Search**.
4. In the Search dialog window, enter `%Refresh%`, and click **Search**.
5. Select the **Refresh Denormalized Product Catalog Table for BI** process in the results that are returned and click **Ok**.
6. Click **Ok** again, if needed.
7. In the Process Details window, click **Submit**.

Related Topics

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

Validate the Sales Catalog

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

1. Sign in as a sales manager or salesperson.

2. Navigate to **Sales** > **Leads** and create a lead.
3. In the Create Lead window, click the **Primary Product** search icon and verify that you can see the product groups in the search utility.
4. Next, navigate to **Opportunities** and create an opportunity.
5. Search for the opportunity you just created and edit it.
6. In the Products region, click **Add**.
7. For Type, select **Group**.
8. In the Product list, verify that your product groups display.
9. In the Products table, click the **Browse Sales Catalog** button. Ensure that you can browse the catalog. Note that this option is available only if the administrator has enabled it.

Related Topics

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

More Sales Catalog Concepts and Procedures

Enable Sales Catalog Browsing in Opportunities (Classic Sales Only)

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

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

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

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

Set the Browse Sales Catalog in Opportunities Profile Option

1. Open the task Manage Opportunity Profile Options from the Setup and Maintenance work area: Go to the **Sales offering** > **Opportunities functional area** > **Manage Opportunity Profile Options task**.
2. In the Manage Opportunity Profile Options page, enter **Browse Sales Catalog in Opportunities Enabled** in the Profile Display Name field.
3. Click **Search**.

4. In the search results, click the profile option name link.
5. Set the profile option value to **Y**.
6. Save your changes.

Territory Filtering of Products in the Catalog

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

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

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

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

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

Set Territory Filter Options

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

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

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

1.

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

Option	Description
Display choice - checked by default	Territory filtering is on. The territory filter check box is displayed and checked by default. The user can deselect the check box to disable the territory filtering.
Display choice - unchecked by default	Territory filtering is off. The territory filter check box is displayed and deselected by default. The user can check the check box to enable the territory filtering.

7. Click **Save and Close**.

How Sales Products and SCM Cloud Products Work Together

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

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

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

Associate Different Catalogs with Different Business Units

When you have multiple business units (BUs), you must create multiple usages, one for each BU. You can then associate a different catalog with each usage. This way, each BU is associated with a separate catalog.

If you have two BUs and you want to associate two different catalogs with the two BUs:

1. Create two different catalogs.

   For more information about creating catalogs, see Sales Catalog High-Level Setup Steps.
2. Create two usages for the two BUs.
   a. In the Setup and Maintenance work area, go to: **Service offering** > **Service Catalog functional area** > **Manage Product Group Usage task**.
   b. In the Manage Product Group Usage page, go to the Product Group Usage region.
   c. Click the **Actions** drop-down list.
   d. Click **Create**.
   e. In the Create Product Group Usage dialog box, in the **Usage** field, specify a name. For example, `BU_1_Usage`.
   f. In the Usage Code field, specify a code.
   g. Deselect the **Allow Duplicate Content** checkbox.
   h. Click **OK**.
   i. To create a second usage for the second BU, repeat steps c to h.
3. Associate a catalog with a usage.

   For more information about associating a catalog with a usage, see *How do I define a catalog for Service?*.
4. Associate a BU with a usage.
   a. In the Setup and Maintenance work area, go to: **Service offering** > **Business Units functional area** > **Manage Service Product Group Usage for Business Unit task**.
   b. For the first BU, deselect the **Use Site Value** checkbox.
   c. In the Business Unit Profile Value column, specify the usage code of the first usage that you created.

      > **Note:** You must specify the usage code, and not the usage name.

5. Click **Done**.
6. Repeat steps 3 to 5 for the second usage and the second BU.

Significance of the Sales Product Type Field

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

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

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

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