Oracle Fusion Cloud Sales Automation

How do I set up Sales Products?

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

Get Help in the Applications

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

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Thanks for helping us improve our user assistance!

1 Get Started

Overview of Sales Products

Create and edit products in Oracle Sales and then use these products in your sales catalog. The sales catalog is the source for product groups and products in leads, opportunities, contracts, and service requests.

Revenue entered for products (and product groups) drives metrics for sales forecasting and salesperson quota. You can also launch the *Oracle Revenue Transformation Solution* to combine subscription products, Oracle CPQ, Oracle Commerce, and Oracle ERP revenue and order management capabilities.

Sales Products Tasks

As the sales administrator, here are your typical sales products tasks:

- Create products, view products, and edit products and have them automatically updated in the Oracle SCM product model.
- Price standalone products directly in price books or in the Edit Product page.
- Add images and attachments to products.
- Add products to your sales catalog.
- Mark products as usable in service requests and customer self-service applications.
- Import products and create and update products using Oracle Import Management.
- Create and update products using Oracle REST or SOAP web services.

For more information about importing products, see *Download the Product Import Files*. For more information about REST and SOAP web services support for products, see the REST API and SOAP web services guides available on *Oracle Help Center*.

Sales Products High-Level Setup Steps

Set up sales products so that you can use them in your sales catalog. The setup involves several implementation steps.

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

Setup Steps for Sales Products

Here are the high-level steps to set up sales products:

Step	Where to Find More Information
Step 1 Ensure the setup prerequisites: 1. Set up units of measure (UOMs) 2. Create a location 3. Create an item master organization 4. Identify the Item Master Organization as the source of import data 5. Specify the item master for sales products	*Sales Products Prerequisites*
Step 2 Ensure the users who will create and manage products have the privilege, Manage Product, in their user role.	*User Requirements for Sales Products*
Step 3 Enable products and product groups in Adaptive Search.	*Enable Products and Product Groups in Adaptive Search*
Step 4 Add products to Sales. The recommended way to get products into the application is to import them. Oracle provides spreadsheet files containing import macros that can make the import much easier than standard Import Management. You also can create products manually in the UI.	• *Overview of Importing Products and Product Groups* • *Create Products Manually in the UI*
Step 5 This step is only required if you're creating products manually in the UI. If you use the import macro files, you don't need to do this step. Set these attributes according to your business needs: • Eligible to Sell • Eligible for Service • Enable Customer Self-Service	*Product Attributes You Must Set* Also see *Sales and Service Catalogs* and *How do I define a catalog for Service?*, if you plan to integrate with Oracle Fusion Service.
Step 6 Add your sales products to the sales catalog hierarchy to make them available in opportunities, leads, and contracts.	*Add Products to the Catalog*
Step 7 Build the item keyword index so that imported products are available in the browse catalog view.	*Build the Item Keyword Index*

Step	Where to Find More Information
Step 8 Run the Import Sales Products scheduled process any time you update or create products in the SCM Cloud Product Model.	*Import Sales Products Scheduled Process*

See the More Concepts and Procedures for Sales Product section in this playbook to learn how you can add more capabilities to sales products, as well as increase your understanding of how sales products work.

Sales Products Prerequisites

Here's an overview of the prerequisites:

- *Create a Location*
- *Create the Item Master and Ensure the Setup of the Location*
- *Ensure Setup of Units of Measure*
- *Specify the Item Master Organization for Sales Products*
- *Identify the Item Master Organization as the Source of Import Data*

Create a Location

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

1. Sign in as a setup user and go to **Setup and Maintenance** > **Sales offering** > **Sales Catalog and Products functional area** > **Manage Locations task**.
2. Click **Create** to create a new location.
3. In the Location Information region, Name field, enter a name. For example, enter `HQ`.
4. Enter any combination of letters or numbers without spaces in the Code field. For example, enter `HQ`. You don't need to change the other values.
5. Click **Submit**.

Create the Item Master and Ensure the Setup of the Location

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

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

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

Here are the steps:

1. Sign in as a setup user and go to **Setup and Maintenance** > **Sales offering** > **Sales Catalog and Products functional area** > **Manage Item Organizations task**.
2. On the Manage Item Organizations page, click **Create**.
3. Enter a name in the Name field, for example, `Vision Item Master`.

   You must select this name when setting the profile option, Sales Products Item Organization, in a separate and related task. This name is visible only during setup.
4. In the Organization field, enter any combination of up to 18 uppercase letters and numbers, for example, `VISION`.

   You must enter this name in the separate and related setup task: Manage Spoke Systems.
5. In the Name field in the Location region, click the down arrow and select **Search** from the list.
6. In the Search and Select: Location Details window, in the Name field, enter the name of the location you created.
7. Click **Search**.
8. Select the organization name and click **OK**.
9. On the Create Item Organization page, click **Next**.
10. On the Manage Item Organization Parameters page, make sure the organization name you entered (`Vision Item Master`) is selected in the Item Master Organization list. This selection establishes the organization as the item master.
11. In the Starting Revision field, enter a number. For example,`1`. Again, your entry doesn't matter.
12. Save your work.

Ensure Setup of Units of Measure

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

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

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

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

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

1. Sign in as a setup user and go to **Setup and Maintenance** > **Sales offering** > **Sales Catalog and Products functional area** > **Manage Units of Measure task**.
2. Create the class for the unit of measure:
   a. Click **Manage UOM Classes**.
   b. On the Manage UOM Classes page, set up each class:
      i. Click **Add**, (the plus sign icon in Search Results).

   ii. Enter the class code (no spaces permitted), class name, and optional description.
   For example, for quantity, enter `QUANTITY` as the **Class Code**, `Quantity` as the **Class Name**.
   iii. Enter a code (three-character limit) and name for the smallest unit you're selling in the **UOM Code** and **Base UOM Name** fields.
   For example, for the class Quantity, enter `Ea` as the **UOM Code** and `Each` as the **Base UOM Name**. Salespeople use your entry in the name field for entering opportunity quantities.
3. Save your work.
4. You created the smallest unit of measure for each class. Now create any additional units of measure for each class:
   a. On the Manage Units of Measure page, click **Add**.
   b. Enter the code and the name of the unit of measure.
   For example, if your smallest unit of measure for the class Time was Minute, then create Hour as another unit of measure if your organization charges by the hour.
   c. Select a class from the Class Name list.
5. Save your work.
6. Click Manage **UOM Standard Conversions**.
7. On the Manage UOM Standard Conversions page, enter the conversions for each of the additional units of measure you created:
   a. Enter the UOM name, for example, `Hour`, and click **Search**.
   b. Enter the conversion. For Hour, enter `60` to indicate there are 60 minutes in the hour.
8. Save your work.

Specify the Item Master Organization for Sales Products

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

1. Sign in as a setup user and go to **Setup and Maintenance** > **Sales offering** > **Sales Foundation functional area** > **Manage Administrator Profile Values**.
2. In the Profile Display Name field, enter `Sales Products Item Organization`.
3. Click **Search**.
4. Click the name of the profile option in the search results.
5. In the Profile Value field, select the item master organization you created from the list.
6. Save your work.

Identify the Item Master Organization as the Source of Import Data

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

1. Open the **Manage Spoke Systems** task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area. (You must use the side-panel search because the task isn't in the Sales offering.)
   The Manage Spoke Systems page appears. You can ignore any error message you receive regarding read permissions.
2. In the Name column in the Search Results region, click the **Product Information Management Data Hub** link.
3. On the Edit Spoke System: Product Information Management Data Hub page, Import Options tab, select the item master organization name you created earlier from the Default Organization list. For example, select VISION.

4. Save your work.

Related Topics

- Item Master Organizations
- Item Organizations
- How Units of Measure, Unit of Measure Classes, and Base Units of Measure Relate to Each Other
- How to Assign Base Units of Measure to Unit of Measure Classes

User Requirements for Sales Products

Users who will be creating and managing products need the privilege, Manage Product (QSC_MANAGE_PRODUCTS_PRIV).

By default, the supplied Sales Administrator and Customer Relationship Management Application Administrator roles have the abilities to create and manage products and product groups, to import products, and to set up product search, eligibility rules, and audit trail reports.

If you've created custom roles for these users, ensure they have the correct privilege in their user roles.

Enable Products and Product Groups in Adaptive Search

For salespeople to see products and product groups in the UI, you must enable them in Adaptive Search.

Here's how:

1. In Setup and Maintenance, go to: **Sales offering** > **Sales Foundation functional area** > **Show: All Tasks** > **Configure Adaptive Search task**.
2. On the Configure Adaptive Search page, click the **Setup** tab.
3. On the Setup tab, **Quick** subtab, select **Product** and **Product Groups**.
4. Click **Publish**.

   After publishing, the application runs an indexing process and an hourly index refresh for product and product group changes. The process can take several minutes to complete, depending on your data volume. You can monitor the progress of the indexing process on the Monitor tab.

Product Attributes You Must Set

When implementing products, set the attributes described here according to your business needs:

- **Eligible to Sell**

  The attribute marks a product as available in the consuming sales applications. You enable or disable this attribute in the edit product pages. It can also be updated using web services or Import Management. This attribute interacts with the SCM Cloud item attributes Customer Orders Enabled and Orderable on the Web. Keep in mind the following points about the attribute:
  - All sales products must have the checkbox checked to be visible in consuming sales applications.
  - If the checkbox is unchecked, then the SCM Cloud item attributes Customer Orders Enabled and Orderable on the Web are set to no.
  - If the checkbox is checked, then the SCM Cloud item attribute Customer Orders Enabled is set to yes.

  > **Note:** After you create a product using the simplified products UI, you can't delete it. To "hide" products in consuming applications, deselect the Eligible to Sell indicator in the product details screen. You can delete products in the Product Model, and then after you run the scheduled process, Import Sales Products from PIM Data Hub, the products are removed from sales. To understand how to delete products in the Product Model, see the Using Product Master Data Management guide.

- **Eligible for Service**

  The attribute makes a product available in the service application. You enable or disable this attribute in the edit product pages. It can also be updated using web services or Import Management. This attribute interacts with the SCM Cloud item attribute Service Request. Keep in mind the following points about the attribute:
  - All serviceable products must have the checkbox checked to be visible in the service request application.
  - If the checkbox is checked in the sales product pages, then the Service Request indicator in SCM Cloud is enabled.
  - If the checkbox is unchecked after being checked in the sales products pages, then the corresponding SCM Cloud item attribute Service Request is set to null.
  - If, in SCM Cloud, the Service Request attribute is disabled, inactive, or null, then the application clears the Eligible for Service checkbox in the sales products pages.

- **Enable for Customer Self-Service**

  The attribute makes a product available in consuming self-service customer applications, such as Oracle Digital Customer Service. You enable or disable this attribute in the edit product pages. You can also update it when adding a product to the catalog. Furthermore, it can also be updated using web services or Import Management. This attribute interacts with the SCM Cloud item attribute Enabled for Customer Self-Service.

Service and Self-Service Attributes Examples

Here are some examples of using the Eligible for Service and Enable for Customer Self-Service attributes:

Example 1

A company that sells electronics has products, such as televisions, appliances, video games, and so on, that are eligible to be serviced. Internally, the company tracks products that help make up these external products, like cables or peripherals.

In this scenario, the company marks all externally-exposed products that can be serviced with Enable Customer Self-Service indicator as yes. It marks the internal products (for example, cables and peripherals) that aren't self-service-enabled, with the indicator as no.

Example 2

Using a self-service application, a customer requests service on the current model of a product. In this case, the models would be marked as Eligible for Service enabled and Customer Self-Service enabled.

However, let's say a customer wants service on an older model of a product. He calls a service agent and the service agent can request service on the older model. In this case, the older model would be Eligible for Service enabled, but Customer Self-Service would be disabled.

Build the Item Keyword Index

The item keyword index lets Product Model users quickly find products in the search list of values. For sales applications, you must build the item keyword index so that products are available in the browse catalog view in sales applications like opportunities and leads.

Here are high-level steps to build the index. For complete details, see the topic on building the item keyword index in the *Implementing Product Management* guide.

1. In Setup and Maintenance, go to: **Product Management offering** > **Items functional area** > **Manage Item Keyword Search Attributes task**.
2. Select the attributes that you want to use in the indexing process.
3. Click **Index** from the global header region and choose from these indexing options:
    - **Create Index**: This action lets you start the indexing process using the current configuration of attributes, organizations, and languages.
    - **Schedule Indexing**: This action gives you the option to schedule the indexing process. The indexing runs based on your selections on this page.

    This starts the indexing process.

Related Topics

- Build Item Keyword Index

Import Sales Products Scheduled Process

Run the Import Sales Products from PIM Data Hub scheduled process any time you update or create products in the SCM Cloud Product Model.

You must run this scheduled process so that products you've created or updated in the Product Model show up in the Sales Products UI.

Here are the steps:

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 `%Sales%Products%`, and click **Search**.
5. Select the **Import Sales Products from PIM Data Hub** process in the results that are returned and click **OK**.
6. Click **OK** again, if needed.
7. In the Process Details window, click **Submit**.

Sales Products Initial Concepts

Be aware of these initial concepts for sales products.

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Sales Products Support a Single Product Life Cycle

Sales products functionality supports a single product life cycle, called Production. If this default life cycle meets your business requirements, no implementation steps are required around product life cycle.

Sales Products Use the Supplied Root Item Class

By default, sales products functionality uses the supplied Root item class to classify products. Additional classifications are only available if you license the Product Hub.

Sales Products Support Custom Inventory Item Status Codes

When setting up products, you can use custom inventory Item Status codes. These codes don't have to be set as Active, either. As long as you have the attributes like Eligible to Sell and Eligible to Service enabled, then products with custom inventory Item Status codes show up in your sales applications.

This change applies to these flows:

- A user adds a product to the product catalog
- A user adds a product to a transaction (for example, they add a product to an opportunity or lead using the standard list of values or by browsing the catalog)
- You add a product to a price book
- Select product using custom product dynamic choice list

To read more about inventory Item Status codes, see *Item Main Specifications* and other topics in the *Oracle SCM Cloud Using Product Master Data Management* guide.

2 Import Products and Product Groups

Overview of Importing Products and Product Groups

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

Here's an overview of the steps:

Step	Where to Find More Information
Step 1 Download the import files.	*Download the Product Import Files*
Step 2 Enter product data and import the products.	*Enter Data into the Product Import Macro and Import*
Step 3 As a checkpoint, you verify the imported products and optionally add images to products.	*Verify Imported Products and Add Product Images*
Step 4 Import the product groups.	*Enter Data into the Product Import Macro and Import*
Step 5 Import the relationship between the products and product groups. In this step, you specify which products belong in which product groups.	*Import the Relationships Between Product Groups and Products*
Step 6 Find the reference number to use when you import the product group structure.	*Get the Reference Number for the Root Product Group*
Step 7 Import the product group hierarchy.	*Import Product Group Hierarchy Information*

Download the Product Import Files

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

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

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

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

Here's how to download the import files:

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

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

Enter Data into the Product Import Macro and Import

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

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

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

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

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

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

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

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

   Here are the details for each existing product attribute:

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

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

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

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

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

    c. Click **Create Import Activity** again.
11. On the Login page, enter the host, user name, and password if required.

12. Click **Submit**.

    The application displays one of these messages:

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

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

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

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

Verify Imported Products and Add Product Images

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

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

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

Import Product Groups

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

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

Here are the details of each column:

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

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

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

      Note: After you correct an error, you must click outside the field for the correction to be recognized.
   c. Click **Create Import Activity** again.
7. Click **Submit**.

   The application displays one of these messages:

Message	Meaning
The file import activity was submitted successfully.	Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.
Unable to connect to the server at this time.	You might have entered an incorrect host.

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

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

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

Import the Relationships Between Product Groups and Products

Import the relationship between product groups and products.

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

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

      The Error worksheet displays your errors.

   b. Click each error link and make the correction.

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

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

   The application displays one of these messages:

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

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

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

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

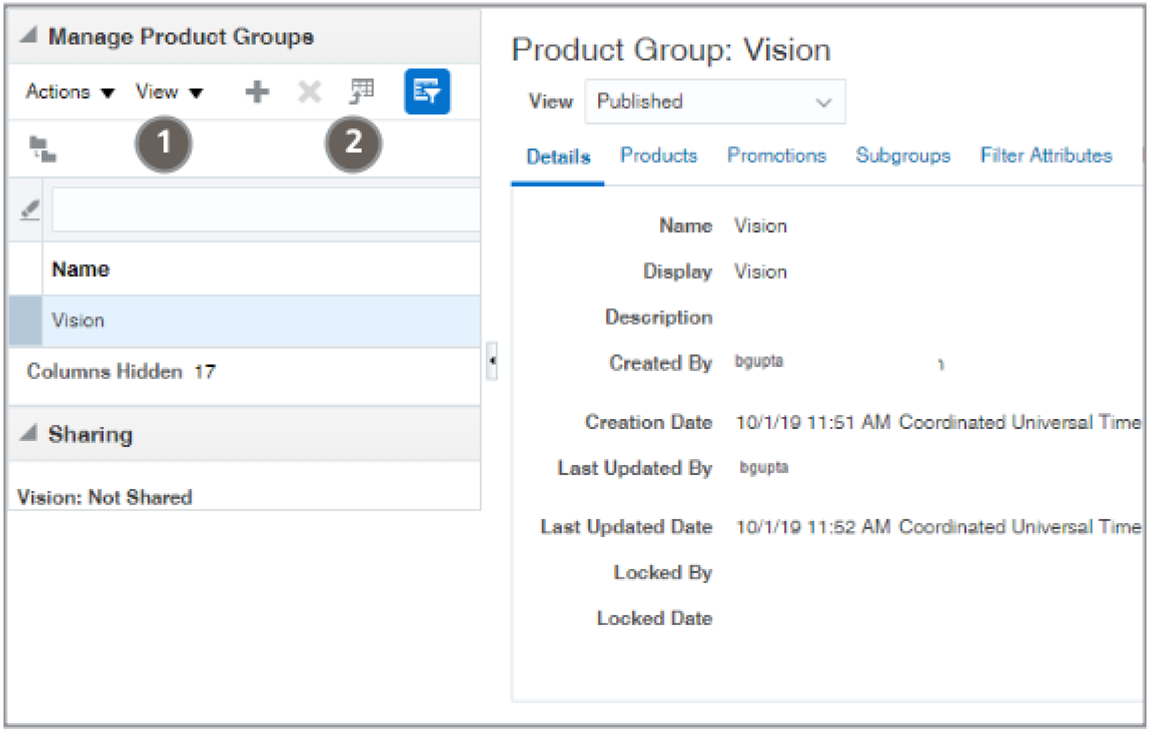
Get the Reference Number for the Root Product Group

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

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

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

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



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

Import Product Group Hierarchy Information

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

1. Open the `ProductGroup_Import_Macro.xlsm` file with the product groups you just imported. You use the product group reference numbers to build the hierarchy.
2. Open ProductGroupRelationSetup_Import_Macro.xlsm.
3. Make sure macros are enabled in Excel.
4. In the ProductGroupRelationSetup_Import_Macro, enter the reference number for each product group and the reference number for its parent. For the product groups immediately under the root product group, you must enter the root product group reference number you got from the UI.
5. When you're done with your entries, click **Create Import Activity**.
6. On the Login page, enter the following:

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

- Your password

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

    a. Click **OK**.

       The Error worksheet displays your errors.

    b. Click each error link and make the correction.

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

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

8. Click **Submit**.

   The application displays one of these messages:

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

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

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

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

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

How can I import additional PIM attributes into Sales products?

While you can't import additional attributes, including descriptive flexfields (DFFs), using the standard scheduled process Import Sales Products From PIM Data Hub, you can create custom fields in the Sales application and then use Import Management to import the additional attributes into them.

For details, see *Import Custom Product Attributes*.

Import Custom Product Attributes

You use Import Management to import your custom product attributes. You can't import additional attributes using the scheduled process Import Sales Products From PIM Data Hub.

> **Note:** If the products are already in PIM, after importing the products, run the Import Sales Products from PIM Data Hub scheduled process.

Prerequisite: Generate Artifacts

You need to generate artifacts before importing custom fields and objects.

1. Go to Application Composer outside of a sandbox.
2. Click **Import and Export** in the navigation menu.
3. Click **Generate**.

You can also generate artifacts on the Generate Import and Export Artifacts subtab, available on the Import Configuration tab in the Import Management area. See: *How do I generate artifacts manually?*

Create the Product Import File, Populate It, and Import the File

Create your import file, populate it with the attributes, and then import the file. See *Import Your Product Data* for more information.

3 Work with Sales Products

Overview of Working with Sales Products

This section covers how to:

- View sales products: This task includes basic and advanced search and creating saved searches.
- Create products: This task includes entering product basic information.
- Edit products: This task includes changing some product basic information (including setting sellable and serviceable attributes) and adding or editing attachments, URLs, and images.
- Configure default pricing: See *Set Default Price Book and Get Prices*.

Related Topics

- Add Products to the Catalog

Create Products Manually in the UI

When you create a product manually in the Sales Products UI, you enter product basic information and save the product for the first time.

Keep in mind that:

- After you create a product using the sales Products UI, you can't delete it. But you can hide it in the UI by deselecting the **Eligible to Sell** option in the product details screen.
- The fields in the sales products UI don't map name-for-name to the SCM application; see the table in this topic for more details.

Here's how to create a new sales product:

1. Navigate to **Sales** > **Products**.
2. In the Products overview page click **Create Product**.
3. In the Create Product page, fill out the fields.

   This table shows the fields, their descriptions, and the table columns in SCM products that they map to:

   > **Note:** To speed up product creation, import your products and product groups. See the *Download the Product Import Files* topic for more information.

Field	Description	SCM Products Table Column Mapping
Product Number	Enter a unique product number. You can't edit this field after you save the product.	Item

Field	Description	SCM Products Table Column Mapping
Name	Enter the name of the product whose number you entered.	Description
Description	Enter a description for the product.	Long Description
Sales Product Type	Further categorize the product by selecting a product type. See *Significance of the Sales Product Type Field*for more information.	Sales Product Type
Default UOM	Select the default UOM for the product. You can't edit this field after you save the product.	Primary Unit of Measure
Eligible to Sell	Check this box to make the product available in the consuming Sales applications.	Customer Orders Enabled
Eligible for Service	Optionally, if integrating with the Service Request application, enable this option. Only products with this option set can be used in the service request application.	Service Request
Enable Customer Self-Service	Optionally, if integrating with Oracle Digital Customer Service or another third-party customer self-service application, enable this option. Only products with this option set can be used in customer self-service applications.	Enable Customer Self-Service

4. Save your changes.

Related Topics

- Add Products to the Catalog

Edit Product Details

When you edit products, you might do these tasks:

- Modify basic information
- Add product information, such as attachments, URLs, and images

To edit product details:

1. Navigate to **Sales** > **Products**.

2. Select a product from the list. The table shows the editable fields, their descriptions, and the table columns in SCM products that they map to.

Field	Description	SCM Products Table Column Mapping
Name	Enter the name of the product whose number you entered.	Description
Description	Enter a description for the product.	Long Description
Sales Product Type	Further categorize the product by selecting a product type. See *Significance of the Sales Product Type Field*for more information.	Sales Product Type
Eligible to Sell	Check this box to make the product available in the consumingSales applications.	Customer Orders Enabled
Eligible for Service	Optionally, if integrating with the Service Request application, enable this option. Only products with this option set can be used in the service request application.	Service Request
Enable Customer Self-Service	Optionally, if integrating with Oracle Digital Customer Service or another third-party customer self-service application, enable this option. Only products with this option set can be used in customer self-service applications.	Enable Customer Self-Service

3. Attachments: Add or remove attachments or URLs as needed. Multiple attachments or URLs can be associated with a product.
4. Images: Add or remove images as needed. Only one image can be associated with a product. All files types supported by Oracle WebCenter Content are supported.
5. When done editing, save your changes.

Related Topics

- Add Products to the Catalog

Add Attachments, URLs, and Images

You can associate both attachments (which can be files or URLs) and images with products. But keep in mind:

- The application supports all file types that are supported by the content storage application, Oracle WebCenter Content.

- You can only associate one image with a product.
- You can associate multiple attachments (files) or URLs with a product.

Configure Default Pricing

You can configure default pricing for products in the sales Products pages.

> **Note:** You can configure pricing for "standalone" products. Standalone products are products that have no association with a product group in the sales catalog. This means you can set prices for products independent of the catalog hierarchy.

Here are the high-level steps to configure default prices for products:

- Enable the Default Pricing region in the Edit Product page, using the steps in the section, Enable the Default Pricing Region, in this topic.
- Configure the pricing. Use the steps in the section, Configure Default Pricing, in this topic.

Enable the Default Pricing Region

After you enable it using Application Composer, the Default Pricing region shows up in the Edit Product page. Here are the steps:

1. Ensure you're working in an active sandbox.
2. Navigate to **Configuration** > **Application Composer**.
3. Under Standard Objects, navigate to **Product** > **Pages**.
4. Go to the Details Page Layouts section and duplicate the standard layout. Name and then edit the resulting layout.
5. In the Details Layout page, click **Show** in the Edit Default Pricing region.
6. Click **Done**.
7. Now, test the change:
    a. Click the **Home** icon in the global header.
    b. Navigate to **Sales** > **Products**.
    c. Edit a product.
    d. Verify that you can see the Default Pricing region on the page.
8. After you have verified the change, publish the sandbox according to your company's business practices.

Configure Default Pricing

Now that you have the Edit Default Pricing region ready to go, search for and edit the product you want to configure pricing for.

> **Note:** As a prerequisite, the product must be created and be in a price book. See the Price Books chapter in this guide for more information. The product doesn't need to be part of a product group or product group hierarchy.

Configure the default pricing:

1. In the Default Pricing region of the Edit Product page, click the **Add** button.

2. Enter the currency, UOM, and list price of the product.
    - Currency: This list of values is based on the same fixed choice list as in the price book header.
    - Name: This field shows the name of the default price book for the selected currency, for your reference.
    - UOM: This list of values is based the same fixed choice list as in the price book line.
    - List Price: This field is the same type of field as in the price book line.
3. Save your work.

Add the product to a published product group to complete the setup and display the product to users in the sales catalog.

Important Considerations for the Default Pricing Region

Keep these considerations in mind as you implement and use the Default Pricing region:

- You can't extend the region. For example, you can't add or remove columns on the table.
- The application doesn't support custom price book and price book line attributes.
- You can only maintain default prices for the product you're editing. However, you can maintain other, additional prices for the product using the Edit Price Book UI or using REST services or import management.
- The region table displays all prices for the product you're editing, from all active default price books.
- If you have added a default price and the corresponding price book becomes inactive or is no longer marked as the default, these prices are no longer displayed in the new region.
- The list of available values in the Currency list is the unique list of currencies from all active, default price books.
- The combination of Currency and UOM must be unique in the table. In other words, you're not able to save multiple rows for the same combination of currency and UOM, for the product you're editing.

Set Default Price Book and Get Prices

You can use a Groovy script to set the default price book on an opportunity and get the latest prices onto the price book. The default price book can be set based on various opportunity attributes.

These opportunity attributes can be, for example, currency, customer geography, or customer account.

Here's how to set a default account price book on an opportunity.

Note that this procedure also sets a default Corporate price book on an opportunity, if an account price book can't be found.

1. Ensure you're working in an active sandbox.
2. In Application Composer, navigate to **Standard Objects** > **Opportunity** > **Server Scripts**.
3. Select the **Triggers** tab.
4. Select the **Add a New Trigger** icon.
5. In the Trigger field, select **Before Insert in Database**.
6. In the **Trigger Name** field, enter `setPriceBook`.
7. In the Trigger Definition region, enter this script:

```
//Fetch the Id of Account Pricebook
```

```
def pricebookId = Organization?.PriceBook_Obj_c?.PricebookId;

// Set the Id of Account PriceBook to Opty
 setAttribute('PriceBook_Id_c', pricebookId);
```

8. Click **Save and Close**.
9. Test the changes and publish the sandbox.

If a price book isn't defined in the Account object, you can define a default price book in Groovy as follows:

```
def accountplist=Organization?.getAttribute('PriceBook_c')
def optyplist=getAttribute('PriceBook_c')
if (optyplist == null ) {
 if (accountplist == null ){
 optyplist = 'Corporate' //This is the name of the default pricebook
 }
 setAttribute('PriceBook_c',accountplist)
```

Note: You can also add the Default Price Book check box to the Edit Price Book page using **Application Composer** > **Price Book Header object** > **Details Page Layouts**.

4 More Concepts and Procedures for Sales Products

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)

Sales Products Business Object Logic

Sales product data follows specific business logic, and at times, as an implementor, you may sometimes need to be aware of how the data maps to other applications or objects.

Here's an example of business logic you may want to be aware of:

- When you create a product in the Sales Products UI, or using web services, the Inventory Item ID is null. However, if you create a product using import, the Inventory Item ID is the same as the Inventory Item ID in the Oracle Supply Chain Management (SCM) Cloud product tables.

This table describes the business logic for various business objects when using sales products. In the table "sales product" means a product created in the sales products UI. "Import" refers to Oracle import.

Sales Products Attribute	Business Logic
Inventory Item ID	• Sales product creation through UI or web services: null. • Sales product creation through import: Same as the Inventory Item ID for the SCM back-end item that's being created as the sales product. The SCM back-end item attribute should match the sales product Number attribute. • Required when a product is updated.
Organization ID	• Sales product creation through UI or web services: The value for the profile option QSC_SALES_PRODUCTS_INVENTORY_ORG_ID is set as the default. • Sales product creation through import: Same as the organization ID for the SCM Cloud back-end item that's being created in Sales products screens.
Item Master Organization	• Sales product creation through UI or web services: The value for the profile option QSC_SALES_PRODUCTS_INVENTORY_ORG_ID is set as the default. • Sales product creation through import: Same as the organization ID for the SCM Cloud back-end item that's being created in Sales products screens.
Item Class	• Required attribute when creating a new product in the SCM Cloud back-end products application. • The value should be **`Root Item Class`**.
Template	• Required attribute when creating a new product in the SCM Cloud back-end products application. • The value should be **`Finished Goods`**.
Number	• Required attribute when creating a new product or updating an existing product. • The value must be unique for an item master. • Creating a product with an existing number throws an API unique violation error.
Name	• Required attribute when creating a new product. • The value should be passed during product update only if changed.
Product Type	Sales products retrieves the list of values for Product Type from the lookup type QSC_SALES_PRODUCT_TYPE. See *Significance of the Sales Product Type Field*for more information.
Default Unit of Measure (UOM)	• Validated against all UOMs that are effective as of current date. • Optional for create operation. • Update of UOM isn't allowed for saved products.
Eligible to Sell	• All Sales products must have this indicator set to yes (checked). • For update operation, pass only if changed. • When a user sets it to no from yes, the corresponding SCM Cloud item indicators Customer Orders Enabled and Orderable on the Web are set to no. • When a user sets it to yes from no, only the corresponding SCM Cloud item indicator Customer Order Enabled is set back to yes.

Sales Products Attribute	Business Logic
Eligible for Service	• All Service products that will be used in the service request management application must have this indicator set to yes (checked). • For update operation, pass only if changed. • When a user sets it to no from yes, the corresponding SCM Cloud item indicator Service Request is set to Disabled • When a user sets it to yes from no, the corresponding SCM Cloud item indicator Service Request is set to Enabled
Image	• Image maps to the SCM Cloud attachment entity ITEM_ENTITY and the category IMAGE. • Only one image per product is allowed. • Optional for create operation. For update operation, pass only if changed. • In the case of errors, API messages are returned.
Attachments	• A product can have multiple attachments. • Only attachments of type "file" are allowed. • Product attachments map to the SCM Cloud items attachment entity ITEM_ENTITY. • The attachment category can be one of the following: ◦ One of the attachment categories associated with the Root Item Class except IMAGE. ◦ Null • Optional during product creation. • Attachments can be added, updated, or deleted at any time. • In the case of errors, SCM Cloud API messages are returned.

Related Topics

- Overview of Sales Products
- Overview of Working with Sales Products
- Sales Products High-Level Setup Steps
- How Sales Products and SCM Cloud Products Work Together

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.

Set Up Product Eligibility

Product eligibility lets salespeople check whether products added to opportunities are eligible to sell based on rules that you set up.

For example, you sell software, and government regulations prevent you from selling certain types of software to certain countries.

So you set up rules to keep salespeople from selling these products to customers with locations in these countries. Salespeople can click the **Check Eligibility** button in the opportunity Products table to check whether products are eligible to sell.

Setup Overview

Perform the steps listed here to enable eligibility in opportunities.

Prerequisite: Before you can implement product eligibility, you must have created a sales catalog and added products to it.

Here are the high-level setup steps:

1. Set up eligibility rules in the catalog.
2. Set the eligibility check to run.
3. Enable the **Check Eligibility** button on the Products table in opportunities.

> **Note:** Keep in mind that eligibility functionality is only available for individual products. You can't implement eligibility rules for product groups. Also, eligibility checks can only be performed in opportunities.

Create Eligibility Rules

You set up eligibility rules in the product group pages in Setup and Maintenance. Here's how:

1. In Setup and Maintenance, go to: **Sales offering** > **Sales Foundation functional area** > **Manage Product Groups task**.
2. In the Manage Product Groups page, select the product group with the products that you're setting up eligibility rules for.
3. Lock the product group so that you can modify it.
4. Select the product that you're setting up eligibility rules for.
5. Add a row to the Eligibility Rules table.

6. In the Eligibility Rules table, for each rule, set your options:
   - **Rule Type**: Set the product as available. To disable eligibility for the product, set the product as unavailable.
   - **Country**: Select the country where Available and Unavailable actions apply.
   - **Dates**: Select the dates for the eligibility rule.
7. Click **Publish**.
8. Unlock the product group.
9. Save your work.

Set Eligibility Check to Run

Set the eligibility check to run using the product group usage pages in Setup and Maintenance:

1. In Setup and Maintenance, go to: **Sales offering** > **Sales Foundation functional area** > **Manage Product Group Usage task**.
2. In the Manage Product Group Usage page, select the **Base** catalog in the upper portion of the page. (If your catalog uses a different usage, then select it.)
3. Click the **Functions** tab in the Details section of the page.
4. For the **Eligibility engine** option, click the **Value** drop-down list and set the value to `Run`.
5. Save your work.

Enable the Check Eligibility Button

Use Application Composer to enable the **Check Eligibility** button on the opportunity Products table:

1. Ensure that you're working in an active sandbox.
2. Click **Navigator** > **Configuration** > **Application Composer**.
3. In the navigation tree, expand **Standard Objects**.
4. Expand the **Opportunity** object and then click **Pages**.
5. In the Opportunity: Pages page, ensure that the **Application Pages** tab is active.
6. In the Details Page Layouts region, select the **Standard Layout** in the table and then click the **Duplicate** icon. The Duplicate Layout dialog box appears.

   Note that you might be using a different layout than the default one. If so, then select the appropriate layout.
7. Enter a name for the new layout and click **Save and Edit**.

   You're returned to the edit page for the new layout.
8. In the Edit Revenue Table region, click the edit icon.
9. In the Edit Revenue Table page, find the **Check Eligibility** button in the Buttons and Actions window. Move the field from the Available Buttons window to the Selected Buttons window.
10. Save your work.
11. Validate the change by navigating to the edit opportunity page and ensuring that you can see the **Check Eligibility** button on the Products table.

    Note that the user you sign in with to validate the change must belong to a sales resource organization. For example, you must sign in as a salesperson.
12. Publish the sandbox according to your company's process.
13. The **Check Eligibility** button is now available to sales users on the opportunity Products table.

Use Access Groups to Secure Product, Product Group, and Price Book Data

You can use access groups to provide different levels of access to sales catalog data (product, product group, and price book data) for different groups of users in your enterprise.

The Product, Product Group, and Price Book objects were previously unsecured so all users had unrestricted access to sales catalog data. Predefined access group rules still provide all users with unrestricted access to this data, but you can now remove or configure this access using these steps:

1. Remove users' global access to sales catalog data in either of these ways:
   - Disable the association between the predefined rules and the All Users system group.

     The All Users system group includes all authenticated users in your environment.
   - Deactivate the predefined rules that provide access to all data.
2. Create custom access groups for different groups of users and specify the object access you want to assign to each group. For example, you might want most users to have Read access to all product, product group, or price book data but restrict Update and Delete privileges to administrators.

Here are the steps to secure the Product, Product Group, or Price Book objects using access groups.

Edit the Global Access Rules for Sales Catalog Data

To use access groups to secure product, product group, or price book data, first edit the predefined rule defined for each object that provides all authenticated users with global access. Here are the steps to edit the predefined rule for the Product object to remove all users access to product data.

1. Navigate to the Access Groups page in the Sales and Service Access Management work area.
2. On the Access Groups page, select the Object Rules tab.
3. Select the **Product** object from the **Object** list.

   All the rules defined for the object are listed in the Rules section.
4. Select the **All Products** system rule. Notice that the **Active** column is checked.

   Details relating to the rule are displayed on the Edit Rule UI.
5. Disable the rule for all users by deselecting the **Enable** checkbox for the **All Users Group** in the Action: Assign Access Group region of the page.

   Alternatively, if you don't want to assign global access to product data for any group of users, you can deactivate the rule by deselecting the **Active** checkbox for the rule.
6. Select **Save and Close** from the **Actions** menu.
7. On the Object Sharing Rules page, select **Publish Rules** from the **Actions** menu. Keep refreshing the screen, using the circular arrow next to the **Rules Last Published** field, until you confirm the rule deactivation has been published. You can also drill into the All Products rule to confirm the **Published Status** field indicates **Published**.
8. Click **Close**.
9. When the Perform Object Sharing Rule Assignment Processing process next runs, any changes you've made to object record access are applied.

To edit the predefined rules that provide global access to Product Group or Price Book object data, use the same process as outlined above, substituting the appropriate rule names:

- For the Product Group object, the predefined rule to edit is All Product Groups.
- For the Price Book object, the predefined rule to edit is All Price Book Headers.

Create Access Groups for Sales Catalog Data

You can now create access groups in the usual way and specify different levels of access to Product, Product Group, and Price Book object data for each group. Here's an example of the high-level steps to follow to configure access for products.

1. Identify the different access levels to product data you want to configure for users and create an access group for each.

   For example, you might create two groups: one group for specific administrators who are to have full access to product data, and one group for all other users who will have only Read access to product data.
2. Assign resources to each group.

   You can assign users to a group manually on the UI, or by defining group membership rules, or by importing the users from a file.
3. For each group, create object sharing rules for the Product object, specifying the type of access to object data group members should have:

   - For the general users access group, create a custom rule for the Product object that provides Read access and assign it to the group.
   - For the administrator users access group, create a custom rule for the Product object that provides Full access and assign it to the group.
4. Publish the rules.

   When the Perform Object Sharing Rule Assignment Processing process next runs, the access defined in the object sharing rules is applied to group members.

Note: An alternative method of assigning full access to product data for the administration users is to create a custom job role and assign the custom role to the administration users. After the Refresh Access Control Data Process runs, a corresponding system access group is generated for the custom role that contains all the users assigned the custom role. Assign the predefined All Products system rule to the generated system group.

To create custom access groups for access to product group or price book data, follow the same process.

Sales Catalog All Access Duty Role

The Sales Catalog All Access (ORA_QSC_ SALES_ CATALOG_ ALL_ACCESS_DUTY) duty role provides all APPID users with global access to sales catalog data. You can't edit the data security policies provided by this duty role, but you can assign the role to other custom roles to provide users with global access to Sales Catalog data instead of creating an access group for these users.

Speed Data Entry Using Dynamic Choice Lists

Increase Efficiency with Product Group Dynamic Choice Lists

Speed administrator tasks by setting up dynamic choice lists for product group data selection within Sales objects like opportunities and leads. After you configure product group dynamic choice lists in Application Composer, Sales Catalog administrators can use them with specific filter criteria. You can also use dynamic choice lists with your own custom objects.

Use the procedure, *Create Product Group Dynamic Choice Lists*, to create the dynamic choice lists. As you implement this feature, keep in mind:

- Oracle supplies an existing filter named `GetProductGroupsForUsage` to facilitate setup.
- The example filter expression value for **Bind_usageCode** is `'BASE'`.
- The example filter expression value for **Bind_UsageModeCode** is `'MOO'` when you define a custom choice list field for Opportunity. This includes any other associated filter functions, such as the territory engine, if defined for Opportunity in the Manage Product Group Usage task.
- If you want a choice list field to display all available product groups, use the filter expression value, `'QSC'` for **Bind_UsageModeCode**.
- The filter expression value for **Bind_UsageModeCode** is `'MKL'` when you define a custom choice list field for Lead.
- For example filter expression values to set up for variable **Bind_UsageModeCode** when you define the custom choice list (dynamic) field for Opportunity, navigate and refer to **Setup and Maintenance** > **Manage Product Group Usage** > **Select Usage: Base** > **Base Details** > **Modes** > **Description**.

Note: You must include the single apostrophes in the filter expression values when you enter them.

Create Product Group Dynamic Choice Lists

The product group dynamic choice lists that you set up let catalog administrators filter data when making selections, thus boosting efficiency and performance.

To enable Product Group dynamic choice lists, you first add a dynamic-choice-list type custom field for an object using Application Composer:

1. Ensure you're working in an active sandbox.
2. Navigate to **Configuration** > **Application Composer.**
3. Navigate to the **Fields** page in Opportunity, Sales Lead, or your own custom object.
4. In the Fields page, create a new, custom field.
5. Select **Choice List (Dynamic)** and click **OK**.
6. Specify basic information in the Create Dynamic Choice List: Basic Information page.
7. Click **Next**.

8. In the Create Dynamic Choice List: List of Values page, select **Product Group** as the related object you want to query to populate the list.
9. For List Selection Display Value, select **Display**.
10. Expand the **Data Filter** region and click **Existing Filter**.
11. For **Data Filter Name**, select **GetProductGroupsForUsage**.
12. For **Bind_UsageModeCode**, specify the expression value, for example, `'MOO'` (for Opportunity).
13. Click **Submit**.
14. Publish the sandbox according to your company's business practices.

Set Up Validation of Product Configurable Models

Validate That Configurable Models Are Entered Correctly

In the sales Products UI, you can set up the UI so that it validates that configurable product model information is entered correctly. Model information in products and product groups includes the collection of model, model line model family, and model attribute values. These values are required to identify Oracle Configure, Price, and Quote (Oracle CPQ) configuration models. This validation enforces consistent entry of model information when managing products and product groups.

This feature lets you validate and enforce consistent entry of model information required to identify Oracle CPQ configuration models for the Oracle CPQ integration purposes.

Keep these points in mind as you set up and use this feature:

- This feature is primarily useful for customers using the Oracle CPQ integration.
- The validation is enforced to ensure entry of Model, Model Line, and Model Family field values when the Configurable field is set to Yes as a user creates or edits a product.
- The validation is enforced to ensure entry of Model Line and Model Family field values when the Model field value is specified as a user edits a product group.
- The entry of model attributes is optional.
- You can also use this feature in REST APIs and in Import Management.

Here are some additional steps to consider to enable this validation feature for Product and Product Groups.

- Users must set the **Configurable** indicator to `Yes` to enforce model information entry validation in the Products UI.
- As an additional configuration, you can set the **Default Operator** to `Is blank` for the **Configurable** field in the Search Region configuration page under Search and Select Dialog Layouts (**Application Composer** > **Product** > **Pages**). This configuration lets users search pre-existing product records that have a blank Configurable field value without having to specify the Configurable condition explicitly.
- Users must specify the Model value to enforce model information entry validation in the Product Group edit UI.

For procedures, see:

- *UI Setup for Validating Product Configurable Models*
- *UI Setup for Validating Product Group Configurable Models*

Note: This feature is primarily useful for customers using the Oracle CPQ integration. For more information about how to enable the integration, see the Integrating Oracle CX Sales with Oracle CPQ guide.

UI Setup for Validating Product Configurable Models

To enable validation of model information entry for Product, adjust the page layout and expose fields for the Product object using Application Composer:

The validation is enforced to ensure entry of Model, Model Line, Model Family, and Model Attributes field values when the **Configurable** field is set to `Yes` as a user creates or edits a product.

1. Sign in as a user with the Sales Administrator job role.
2. Ensure you're working in an active sandbox.
3. Navigate to **Configuration** > **Application Composer**.
4. Navigate to the **Product** object and click **Pages**.
5. Navigate to the **Details Page Layouts** region and duplicate the standard layout to create a new, custom layout.

   Note: To expose model information fields in the Create Product page, use the Creation Page Layouts region in Application Composer.

6. Edit the new layout.
7. In the Details Layout region, click the edit icon in the Edit Subtab: Summary region.
8. In the Configure Detail Form page, move the Configurable, Model, Model Line, Model Family, and Model Attributes fields to the Selected Fields area in the given order.

   Note: You must expose all five fields in the given order, for example: Configurable, Model, Model Line, Model Family, and Model Attributes.

9. Save your work.
10. Navigate to the Edit Product page in **Sales** > **Products**. Verify that the Configurable, Model, Model Line, Model Family, and Model Attributes fields appear in the Edit Product page.
11. Publish the sandbox according to your company's business practices.

UI Setup for Validating Product Group Configurable Models

To enable validation of model information entry for Product Group, adjust the Desktop page layout and expose fields for the Product Group object using Application Composer:

The validation is enforced to ensure entry of Model Line and Model Family field values when the **Model** field value is specified as a user edits a product group.

1. Sign in as a user with the Sales Administrator job role.
2. Ensure you're working in an active sandbox.
3. Navigate to **Configuration** > **Application Composer**.
4. Navigate to the **Product Group** object and click **Pages** > **Desktop Pages**.
5. Click **Edit Summary Form** in the Details Page region.

6. In the Edit Details Page Summary Form page, in the Configure Default Summary region, move the Model, Model Line, Model Family, and Model Attributes fields to the Selected Fields area in the given order and save.

> **Note:** You must expose all four fields in the given order, for example: Model, Model Line, Model Family, and Model Attributes.

7. Navigate to Setup and Maintenance and Search for the task, Manage Product Groups.
8. Select a product group and click **Lock** to edit the product group. Verify that the Model, Model Line, Model Family, and Model Attributes fields appear in the Product Group page.
9. Unlock the product group.

5 Get Started with Assets

Overview of Setting Up Sales Assets

The CRM Asset object is the default assets module in Oracle Sales. You can use it or you can enable Oracle Supply Chain Management (Oracle SCM) Installed Base Assets, which provides more functionality.

Setup Options for Assets in Sales

This table describes configuration options for assets in the sales application:

Decision Point	Description	Where to Find More Information
Decide whether to use the default Oracle CX Assets functionality that comes supplied with Sales or to use Oracle SCM Installed Base Assets. **Note:** You can't use both in the sales application.	Which option you choose depends on your business needs. The default option lets your users do basic asset tracking. If you enable Oracle SCM Installed Base Assets, your users have extra capabilities to manage assets in Activities and in the Accounts pages.	*Enable SCM Installed Base Assets in Activities and Accounts*
Configure Assets saved search.	Use a profile option to set the number of days that the application retrieves records in the All My Customer's Assets saved search.	*Configure Assets Saved Search*
Expose the Assets icon in the Navigator and Sales springboard.	The Assets icon isn't available by default from the Navigator and Sales springboard.	*Expose the Assets Icon in the Navigator and Springboard*
Enable subtabs for opportunities, leads, and activities in the Edit Asset page.	You can expose the Opportunities, Leads, and Activities subtabs in the Edit Asset page to let salespeople associate assets with these business objects.	*Enable Opportunities, Leads, and Activities Subtabs on the Edit Asset Page*
Enable the Assets list-of-values (LOV) in Accounts and Activity pages.	The Assets LOV isn't available by default in the Accounts and Activity pages. You can expose the Assets LOV in these pages so that salespeople can associate assets with accounts and activities like tasks and appointments.	*Enable the Assets List of Values*
Enable the Assets subtab in the Accounts pages to let salespeople associate an asset with an account.	The Assets subtab isn't available by default in the Accounts pages. You must expose asset fields on the Accounts pages to display the asset information for the account.	*Enable the Assets Subtab in Accounts Pages*

Sales Catalog Integration

The Assets application is automatically integrated with the sales catalog and with sales products. In the assets pages, lists of values appear for products and product groups that are included in the catalog. For more information, see *Sales Products High-Level Setup Steps*and *Overview of Sales Catalog Setup*.

Import and Web Services Integration

Using Oracle Import and Export Management, you can import assets into the application. You can also use web services to create an asset. For more information, see the *Understanding Import and Export Management for CX Sales and Fusion Service* guide and *REST API for CX Sales and Fusion Service*

Overview of Asset Security

By default, the standard Sales job roles, such as Sales Representative and Sales Manager, have access to the Assets UI. If you want to configure Assets security, use the information in this topic.

If duty roles aren't configured, then users need one of these duties to view, create, edit, delete, and export assets:

- Sales Party Review duty (grants view access only)
- Sales Party Management duty
- Marketing Sales Party Management duty

The duty roles can be configured by adding or removing these privileges:

- View Assets
- Create Asset
- Edit Asset
- Delete Asset

For more information about configuring roles, see these guides:

- *What are the basic security concepts and procedures for Oracle CX?*
- *How do I create and manage users?*
- *Security Reference for Sales and Fusion Service*
- *Oracle Fusion Cloud Applications: Securing Applications*

Expose the Assets Icon in the Navigator and Springboard

The Assets icon isn't available by default on the Navigator or on the Sales springboard. Here's how to enable it:

1. Ensure you're working in an active sandbox.
2. Click **Navigator** > **Structure**.
3. In the Structure page, ensure that the **Navigation Configuration** tab is selected.
4. Expand the **Sales** node and click the **Assets** link.
5. In the Edit Page Entry: Assets page:
    a. In the Navigator field, select **Yes**.
    b. In the Springboard field, select **Yes**.
    c. Save.

6. Verify the changes by signing in as a user with access to the Sales pages, such as a salesperson. Ensure you can see the Assets icon on the Navigator and on the Sales springboard.
7. Publish the sandbox according to your company's business practices.

For more information about modifying the UI and using sandboxes see the *Configuring Applications Using Application Composer* guide.

Enable SCM Installed Base Assets in Activities and Accounts

Let salespeople manage activities like tasks and appointments more efficiently by including Oracle SCM Installed Base Assets in Activities. You can also enable the Installed Base Assets tab in the Accounts pages.

For example, salespeople can tie the maintenance of a copier to a task, or in the Automobile verticals application, tie a car's test drive to an appointment.

You can add Installed Base Assets fields to the Activity and Account page layouts, using Application Composer. From these pages, installed base asset data can be passed to downstream processes such as Field Service or Service Logistics.

You can show these attributes or fields on the Activity create and edit pages:

- Installed Base Asset
- Installed Base Asset Number
- Installed Base Asset Serial Number

Opt In to Installed Base Assets

Ensure first that you've opted in to Installed Base Assets:

1. In Setup and Maintenance, go to the **Sales offering** and click the **Change Feature Opt in** link.
2. Click the **Features** icon for Sales in the first row.
3. Select **Manage Assets Using Common Asset Model**.
4. Click **Done**.
5. Click **Done** on the Opt In page.

> **Note:** This is a global setting where you choose whether to use Oracle SCM Installed Base Assets or the default Oracle CX Asset object. You can't use both asset objects in the sales application, so carefully consider the impact if you have requirements to support asset management.

Configure Assets Saved Search

Use a profile option to set the number of days that the application retrieves records in the All My Customer's Assets saved search.

Set the Assets Saved Search Profile Option

Use the profile option, Default Asset Purchase Date (ZCM_ASSET_DEFAULT_PURCHASE_DATE), to set the number of days in the past to show asset records. The search is based on an asset's purchase date.

To set the profile option:

1. In Setup and Maintenance, go to: **Sales offering** > **Sales Foundation functional area** > **Manage Administrator Profile Values task**.
2. Search for the profile option by code or display name.
3. Set the profile value in days. See How the Profile Option Is Calculated in this topic for more information.
4. Save your work.

How the Profile Option Is Calculated

If you select 60 in the profile option, then the application retrieves all those assets whose purchase date is within 60 days of the current date.

Similarly, you can select 90 or 180 days, and the application retrieves assets whose purchase date is within the selected days from the current date.

Note: You can update or remove the purchase date from the Advanced Search option.

Enable Opportunities, Leads, and Activities Subtabs on the Edit Asset Page

You can expose Opportunities, Leads, and Activities subtabs on the Edit Asset page to let salespeople associate assets with these business objects By default, these subtabs don't appear in the Edit Asset page.

Here's how to show these subtabs on the Edit Asset page:

1. Ensure you're working in an active sandbox.
2. Navigate to **Application Composer**, in the Configuration category.
3. In the navigation tree, expand **Standard Objects**, expand **Asset**, and click **Pages**.
4. Ensure that the **Application Pages** tab is selected.
5. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the duplicate icon.
6. Enter a new layout name and click **Save and Edit**.
7. In the Details Layout page, Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon.
8. In the Configure Subtabs dialog box, move the relevant business object from the Available Subtabs window to the Selected Subtabs window.
9. Click **OK**.
10. From the Details Layout page, click **Done**.
11. Make sure that the layout status for your layout is set to Active.
12. Test the changes:
    a. Navigate to **Sales** > **Assets** as a user with access to the assets pages, for example, as a salesperson.
    b. Edit an asset and ensure you can see the relevant business object's subtab in the Edit Asset page.

13. Publish the sandbox according to your company's business practices.

Enable the Assets LOV in Activities Pages

You can expose the Assets list of values (LOV) in the Activities pages for salespeople to associate an asset with appointments, tasks, and call reports. By default, the Assets list doesn't appear in the Activities pages.

To enable the Assets LOV in the Activities pages:

1. Ensure you're working in an active sandbox.
2. Navigate to **Application Composer**, in the Configuration category.
3. In the navigation tree, expand **Standard Objects**, expand **Activity**, and click **Pages**.
4. Ensure that the **Application Pages** tab is selected.
5. Find the section you want to add the Assets list to. For example, to add the Assets list to the appointment details page, use the Appointment Details section in the Details Page Layouts region.
6. Within that section, duplicate the standard layout by highlighting the standard layout and clicking the duplicate icon.
7. Enter a new layout name and click **Save and Edit**.
8. In the Details Layout page, click the edit icon to edit the Summary region.
9. In the The Details Layout: Edit Summary page, in the Configure Detail Form section, move the **Asset** field from the **Available Fields** box to the **Selected Fields** box.
10. Click **Save and Close**.
11. On the Details Layout page, click **Done**.
12. Ensure that the layout status for your new layout is **Active**.
13. Test the changes:
    a. Navigate to **Sales** > **Activities** as a user with access to the Activities pages, for example, as a salesperson.
    b. Edit an appointment and ensure you can see the Asset list in the Edit Appointment page.
14. Publish the sandbox according to your company's business practices.

Enable the Assets Subtab in Accounts Pages

You can expose the Assets subtab in the Accounts pages to give salespeople the ability to associate an asset with an account. You must expose asset fields on the Accounts pages to display the asset information for the account.

By default, the Assets subtab doesn't appear in the Accounts pages.

> **Note:** You also can expose a subtab for Installed Base Assets (part of Oracle SCM) in accounts. This is a separate configuration, not part of CRM Assets. Therefore, Installed Base Assets won't show in the Assets subtab. Instead, you need to expose the Installed Base Assets subtab using Application Composer.

Here's how to expose the Assets subtab list in the Edit Account page:

1. Ensure you're working in an active sandbox.
2. Navigate to **Application Composer**, in the Configuration category.
3. In the navigation tree, expand **Standard Objects**, expand **Account**, and click **Pages**.
4. Ensure that the **Application Pages** tab is selected.

5. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
6. Type a new layout name and click **Save and Edit**.
7. In the Details Layout page, in the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon.
8. In the Configure Subtabs dialog box, move **Assets** from the Available Subtabs to the Selected Subtabs window.
9. Click **OK**.
10. Back in the Details Layout page, click **Done**.
11. Be sure that the layout status for your user-defined layout is Active.
12. Test the changes: Navigate to **Sales** > **Accounts** as a user with access to the assets pages, for example, as a salesperson. Edit an account and ensure you can see the Assets subtab in the Edit Account page.
13. Publish the sandbox.