Oracle Fusion Cloud Sales Automation

Implementing Sales

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Implementing Sales

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Get Help in the Applications

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1 Introduction

How to Use This Guide

Use this guide together with the sales playbooks available on the *Sales Playbook page* to learn how to implement Oracle Sales for Redwood. The chapters in this guide provide you with information on some features, but many key features are covered in separate playbooks. For features relevant to implementation of the Classic version of Oracle Sales, see the *Implementation Reference* guide.

Here's a list of some of the most important playbooks for implementation:

Key Playbooks	Descriptions
How do I get started with Oracle Sales in the Redwood User Experience?	Provides basic setup for new customers.
What's my roadmap for implementing Oracle Sales in the Redwood User Experience?	Provides a roadmap for setting up a new implementation. The steps are aimed at customers implementing Sales for the first time, not for those migrating from classic Sales to Redwood.
How can I speed up my transition from classic Oracle Sales to the Redwood platform?	Explains how the Redwood Migration Accelerator tool simplifies and speeds up your transition from classic Oracle Sales to Oracle Sales for Redwood.
How do I configure Adaptive Search?	Explains how to enable and configure search for Sales for Redwood.
How do I configure the Sales Dashboard in the Redwood User Experience?	Explains how to configure sales dashboards for different roles in the organization. The sales dashboards provide an overview of key sales information and tasks as well as a good starting point for your daily sales activities.
• *How do I set up Sales Products?* • *How do I get started with the Sales Catalog?*	Explain how you build a sales catalog with products and product groups. Assets functionality is available by default, or you can integrate with Oracle SCM Installed Base Assets for added features.
How do I get started with Orchestration?	Explains how to guide salespeople with best practices for different sales situations using orchestrations. It also helps eliminate the need for training on various nonstandard procedures unique to specific businesses.
How do I integrate Microsoft Teams with Redwood User Experience?	Explains how to enable web conferencing using Microsoft Teams.
How do I implement Microsoft 365 for Oracle Sales Redwood UX?	Explains how to implement the Sales for Outlook add-in.
How do I configure CX Sales Mobile?	Explains how to set up the Oracle CX Sales Mobile app. The app helps salespeople manage their day effectively and develop customer relationships using their phone or tablet.
How do I integrate LinkedIn with Oracle Sales?	Explains how to set up LinkedIn integration to allow salespeople to use the LinkedIn Sales Navigator.
How do I get started with Sales Forecasting?	Explains how to set up and use forecasting.
How do I get started with Sales Intelligence?	Explains how to get started with Oracle Sales Intelligence features.

Key Playbooks	Descriptions
How do I enable the Generate Account Description feature in Sales for Redwood?	Describes how to set up and use the Generate Account Description feature. The feature uses generative AI to help you create account descriptions from PDFs you upload.

How can I quickly import records during implementation?

You can use Oracle Sales quick import macro files to speed creation of records in your implementation.

You can import up to 5,000 records at a time using the quick import macro files.

Sales Objects You Can Import with Quick Import Macro Files

The quick import macro files are available for these Sales business objects:

Business Object	Where to Find More Information
Accounts and Contacts	*Overview of Account and Contact Import*
Account Hierarchy	*Import Accounts and Account Hierarchies Using the Account Import Macro File*
Leads	*Import Leads Using the Import Macro*
Opportunities	*Overview of Opportunity and Revenue Lines Import*
Products and Product Groups	*Overview of Importing Products and Product Groups*
Users (sales resources)	*Overview of Importing Sales Resources*

For more import options, see *What are my data import options?*.

2 Implementation (Setup) Users

Setup Overview

Using the Setup Assistant, you can create up to 15 users to help you with setup.

Use this chapter to:

- Create additional setup users.
- Enable the initial user created by Oracle to participate in the setup process.

  The initial user can perform security tasks, such as creating other users and granting setup permissions, but needs the additional privileges granted to setup users.
- Enable setup users to monitor all background processes
- Learn how to reset passwords for users

Here's a list of the setup tasks. You can open the tasks from the Sales offering in the Setup and Maintenance work area. Tasks are organized by functional areas. Remember that you may have to show All Tasks to see the task you want.

Step	Description	Navigation	Where to Get More Details
1	Create other setup users.	**Setup and Maintenance** > **Sales** > **Users and Security** > **Manage Users**	*Create Setup Users*
2	Provision the initial user with the same permissions as the other setup users.	**Setup and Maintenance** > **Sales** > **Users and Security** > **Manage Users**	*Provide the Initial User the Same Permissions as Other Setup Users*
3	Any setup users you create receive an email notification with a link they can use to reset their passwords. If they don't receive the email for some reason, you can reset user passwords and update email addresses in the Security Console. (You can open the Security Console using the task Manage Applications Security Preferences)	**Setup and Maintenance** > **Sales** > **Users and Security** > **Manage Applications Security Preferences**	See the section: Reset User Passwords and Update Email Addresses To understand the notification process for new accounts and recommendations on the kinds of notification changes you may want to make, see the topic: *Automatic New Account Notifications and What to Change* For setup instructions, see: *Set Up Preferences for User Names, Passwords, and Notifications*
4	By default, setup users can only see the scheduled processes they themselves submit. Use the Security Console to provide all of the setup users the ability to see what processes are running	**Setup and Maintenance** > **Sales** > **Users and Security** > **Manage Applications Security Preferences**	See the topic: *Give Users the Permission to View All Scheduled Processes*

Step	Description	Navigation	Where to Get More Details
	and their status, no matter who submitted them.		

About Setup Users and Security

Providing users with the security permissions they need to complete the setup tasks in this guide is very simple if you used Setup Assistant for your initial setup. You just make a couple of entries and click Save. Provisioning rules provided by Oracle do the rest. This topic provides a brief overview of Oracle's security model, lists the permissions that setup users need, and explains how the provisioning process works.

How Permissions Are Grouped and Provisioned

Oracle uses the Role-Based Access Control (RBAC) security industry standard. The permissions are grouped in two types of roles:

- Job roles, which provide users with the permissions to carry out tasks specific to a job, such as a sales manager or sales administrator
- Abstract roles, which permit users to complete tasks that are common to all employees or resources

You typically provision salespeople with the job roles corresponding to the roles they play in the sales organization (their resource roles), as well as the employee and resource abstract roles. The employee abstract role provides access to reports and personal profile information. Without the resource abstract role, users can't participate in the sales process, create accounts and opportunities, or be assigned to sales teams. You can find the description of each job and abstract role Oracle provides and all the duties that come with it in security reference guides.

When you create users, the application automatically provisions them with the required job roles and abstract roles using role-provisioning rules. Each role-provisioning rule is made up of the rule conditions and the names of the job roles and abstract roles that are assigned to the user if the conditions are met. In the sales application, the job role and the resource abstract role are assigned to a user based on the resource role. The employee abstract role is provisioned to all users of type employee.

As long as you used Setup Assistant, the application creates all the role-provisioning rules you need for setup users and all the standard sales users. If you set up the company information in a different way, then you must create all the role provisioning rules yourself. That's true if you're setting up the application together with Oracle HCM Cloud or another cloud service. You must also create role-provisioning rules for any additional resource roles you create. You can learn more about role-provisioning rules in the Get Ready to Create Sales Users chapter and in the Securing CX Sales and B2B Service guide.

Security Roles Required by Setup Users

To complete the setup tasks in this guide, you must be provisioned with the security roles listed in the table. The initial user provided by Oracle comes provisioned with only the first three. While the initial user can create other users and perform many setup tasks, the initial user can't complete all the tasks without the additional security roles.

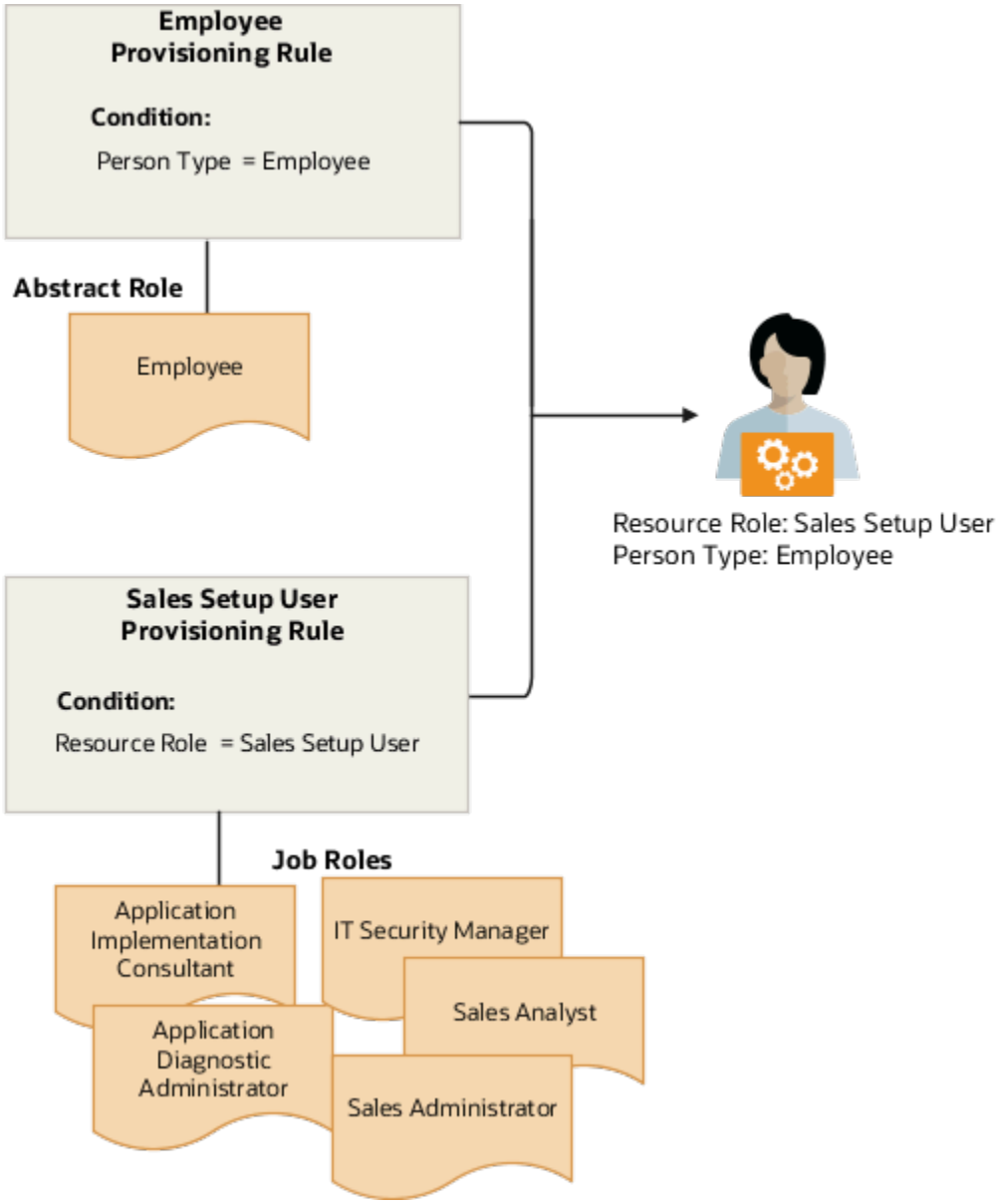
Role	Type	Permissions the Role Provides
Application Implementation Consultant	Job Role	Access all setup tasks across all products
IT Security Manager	Job Role	Access security tasks, including the ability to assign other security roles
Application Diagnostics Administrator	Job Role	Access diagnostic tests and data
Employee	Abstract Role	Access BI reports and run and monitor background processes
Sales Analyst	Job Role	Create sales recommendation rules
Sales Administrator	Job Role	Perform the sales administrator duties

Note: For licensing reasons, use the Application Implementation Consultant role only for the initial setup tasks.

How You Create and Provision Setup Users

To provision the required security roles, just create setup users as users of type employee and assign them the Sales Setup User resource role. It doesn't matter whether the user you're setting up is an actual employee or not. Provided you used Setup Assistant for your initial setup, Oracle creates two role-provisioning rules that do the rest:

- The Employee rule automatically assigns the Employee abstract role to all users of type Employee.
- The Sales Setup User rule automatically assigns all users with the Sales Setup User resource role (the condition), with all of the required job roles.



The setup users you create aren't assigned the Resource abstract role, so they can't participate in the sales process. But there is nothing stopping you from creating other provisioning rules to provision sales administrators or others with the same setup permissions.

Create Setup Users

Follow this procedure to create users who can perform the sales setup discussed in this guide.

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Users and Security

- Task: Manage Users

Alternatively, click **Navigator** > **My Team** > **Users and Roles**.

2. On the Search Person page, click **Create**.
3. On the Create User page, in the Personal Details region, enter the user's name and a unique email address.

   The application automatically sends user notifications to this email address unless you disable notifications in the Security Console.
4. In the User Details region, you can enter a user name.

   If you leave the **User Name** field blank, the application automatically creates a user name for you. By default, the application uses the email unless you made changes in the Security Console.
5. To automatically send an email notification to the user, select the **Send user name and password** option in User Notification Preferences. The email includes a link to create a password in the application.

   > **Note:** If this option isn't available, notifications may be disabled. Check the notification settings in the Security Console.

6. Select these values in the Employment Information region:

Field	Value to Select	Comments
Person Type	Employee	For setup only. The user need not be an employee.
Legal Employer	Your company name followed by the letters `LE`	The legal employer name is used for setup only, so doesn't have to correspond to any actual entity.
Business Unit	Your company name followed by the letters `LE BU`	The business unit name, like the legal employer name, is used for setup only.

7. In the Resource Information section, select **Sales Setup User** from the **Resource Role** list.
8. Click **Autoprovision Roles**.

   The **Role Requests** region displays the following roles:

   - Application Diagnostics Administrator
   - Application Implementation Consultant
   - IT Security Manager
   - Employee
   - Sales Analyst
   - Sales Administrator

   The role request process may take a few minutes to complete because it's set to run periodically. You can view the status of the request anytime you edit the user.
9. Click **Save and Close**.

If you selected the **Send user name and password** option and notifications are enabled, the application sends the new account notification email. If you didn't select this option, then you must reset the password for the user using the procedure described in the Resetting User Passwords topic. After you create the user, you can no longer update the email address in this UI. You can instead update the email address on the Users tab in the Security Console.

Related Topics

- Set Up Preferences for User Names, Passwords, and Notifications
- Automatic New Account Notifications and What to Change

Provide the Initial User the Same Permissions as Other Setup Users

Use this procedure to grant the initial user the same permissions as the other setup users.

1. Click **Navigator** > **My Team** > **Users and Roles**.

   Alternatively, you can open this task from the Setup and Maintenance work area:

   - Offering: Sales
   - Functional Area: Users and Security
   - Task: Manage Users
2. On the Search Person page, enter the first name of the initial user in the **Keywords** field and click **Search** (the right-arrow icon).
3. Select the name link in the Search Results.
4. On the Edit User page, in the **Resource Information** region, select **Sales Setup User** from the **Resource Role** list.
5. Click **Autoprovision Roles**.

   The **Role Requests** region displays these roles:

   - Sales Analyst
   - Employee
   - Sales Administrator

   Your role request process may take a few minutes to complete because it's set to run periodically. You can view the status of the request anytime you edit this user.
6. Click **Save and Close**.

   If you're signed in as the initial user, you must sign out and then sign in again for the new permissions to take effect.

Reset User Passwords and Update Email Addresses

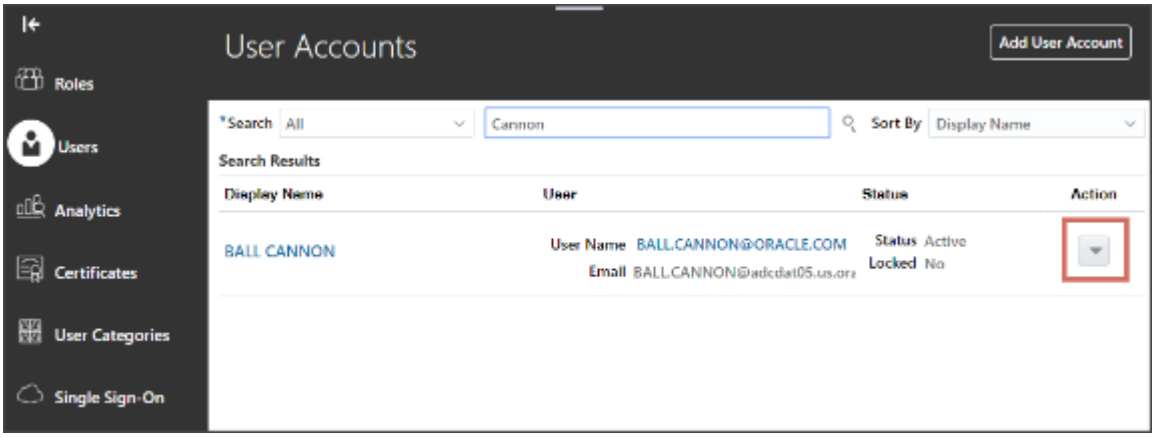
Reset Passwords for Others

Use the Security Console to reset passwords for other users. Only setup users, and other users with the IT Security Manager job role, can access the Security Console.

All users can reset their own passwords by clicking their user name or image, and selecting the **Set Preferences** link in the Settings and Actions menu. They can also reset their passwords by using **Forgot Password** on the sign-in page.

1. Open the Security Console. You have two options:
    - In Setup and Maintenance, go to the following:
        - Offering: Sales
        - Functional Area: Company Profile
        - Show: All Tasks
        - Task: Manage Applications Security Preferences
    - Click **Navigator** > **Tools** > **Security Console**.
2. You can ignore and close any warnings regarding the scheduling of the Import Users and Roles Application Security Data job.
3. Click the **Users** tab.
4. Search for the user using one of the following:
    - First or last name, but not both
    - User name

    Here's a screenshot of the Users tab highlighting the location of the Action menu.



5. From the **Action** menu, select **Reset Password**.

6. In the Reset Password page, you have two options:
    - To send an email to users with a link they can use to create their own passwords, select the **Automatically generate password** option.
    - Reset the password yourself:
        i. Select the **Manually change the password** option.
        ii. Enter the new password twice.

    > **Note:** The manual option is available only if you selected the **Administrator can manually reset password** option while editing the password policy for the DEFAULT user category in the Security Console.

7. Click **Reset Password**.

Related Topics

- Set Up Preferences for User Names, Passwords, and Notifications

Change a User's Email Address

To change sales users' email addresses, use the same import process that you used to create them. You can also use REST services.

You can also use these steps to change email addresses on the Users tab in the Security Console work area. However, this method is not always foolproof:

1. Open the Security Console by clicking the **Security Console** link under the **Tools** heading in the Navigator.
2. Click the **Users** tab.
3. Search for the user using one of the following:
    - First or last name, but not both
    - User name
4. Click the user name link.
5. On the User Account Details window, click **Edit**.
6. In the Edit User Account window, edit the email address.

    > **Note:** Don't edit any of the other information available on the Edit User Account page. Use the Manage Users task instead.

7. Click **Save and Close**.

Related Topics

- What can I use the Security Console for?

Change Your Password

Use the application link your company gave you to open the Sign In page and change your password for better security. You can use either of these methods to change your password.

- After you sign in, you can change your password using the **Set Preferences** option.
- On the Sign In page, you can change your password using the **Forgot Password** link.

Change Your Password Using Set Preferences

1. Click your user image or name in the global header, and on the **Settings and Actions** menu, select **Set Preferences**.
2. In the General Preferences section, click **Password**, and enter your password details.
3. Click **Save and Close**.

Change Your Password Using Forgot Password

1. On the Sign In page, click the **Forgot Password** link.
2. Enter the registered work email, select the Forgot Password option and click **Submit**.
   A notification containing a link to reset your password is sent to your work email.

Note:

- If you don't have your work email registered, the notification is sent to your line manager.
- If both you and your line manager don't have work emails registered, you'll not be able to reset your password. Contact your security administrator to register your work email.

This table shows which method you can use for resetting passwords based on your Single Sign-On (SSO) configuration.

SSO Configuration	Password Reset Method to Use	
	Set Preferences Option	Forgot Password Link
SSO Disabled	Yes	Yes
SSO Enabled	No	No
SSO with Chooser Enabled (both SSO sign-in and local authentication options are available)	No	Yes

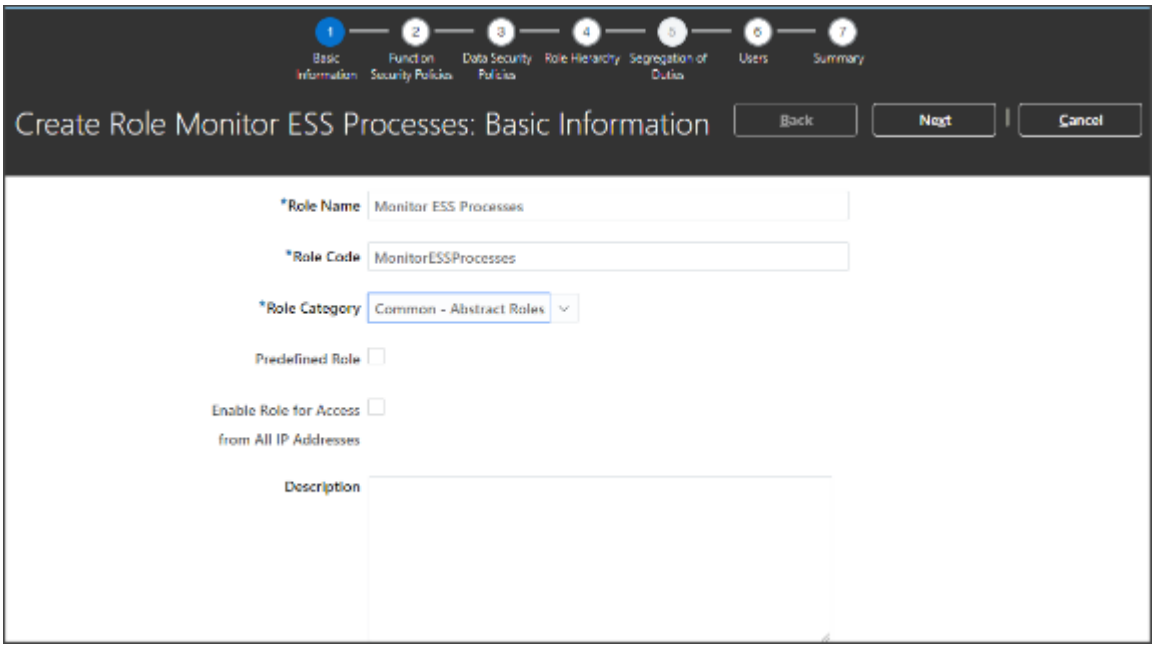
Give Users the Permission to View All Scheduled Processes

Your application setup requires you to run numerous scheduled processes and ensure they complete successfully. By default, users can only see the scheduled processes they themselves submit. By creating a custom role in the Security

Console and assigning all of the setup users to it, you ensure that everyone can see what processes are running and their status, no matter who submitted them.

1. Open the **Security Console**.
2. Click the **Roles** tab.
3. On the Roles tab, click **Create Role**.

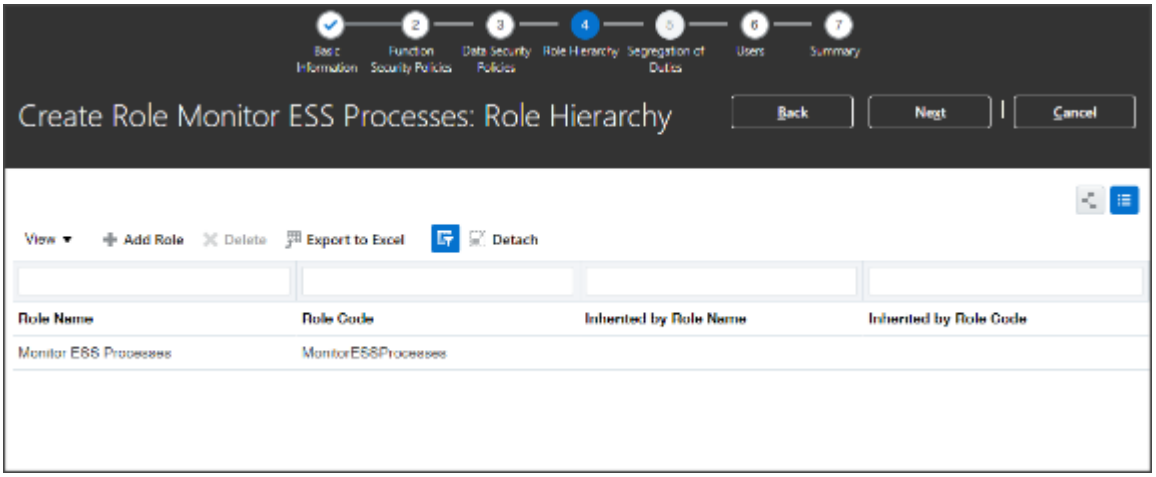
   The Create Role page displays a series of steps you can click directly or reach using the **Next** button.



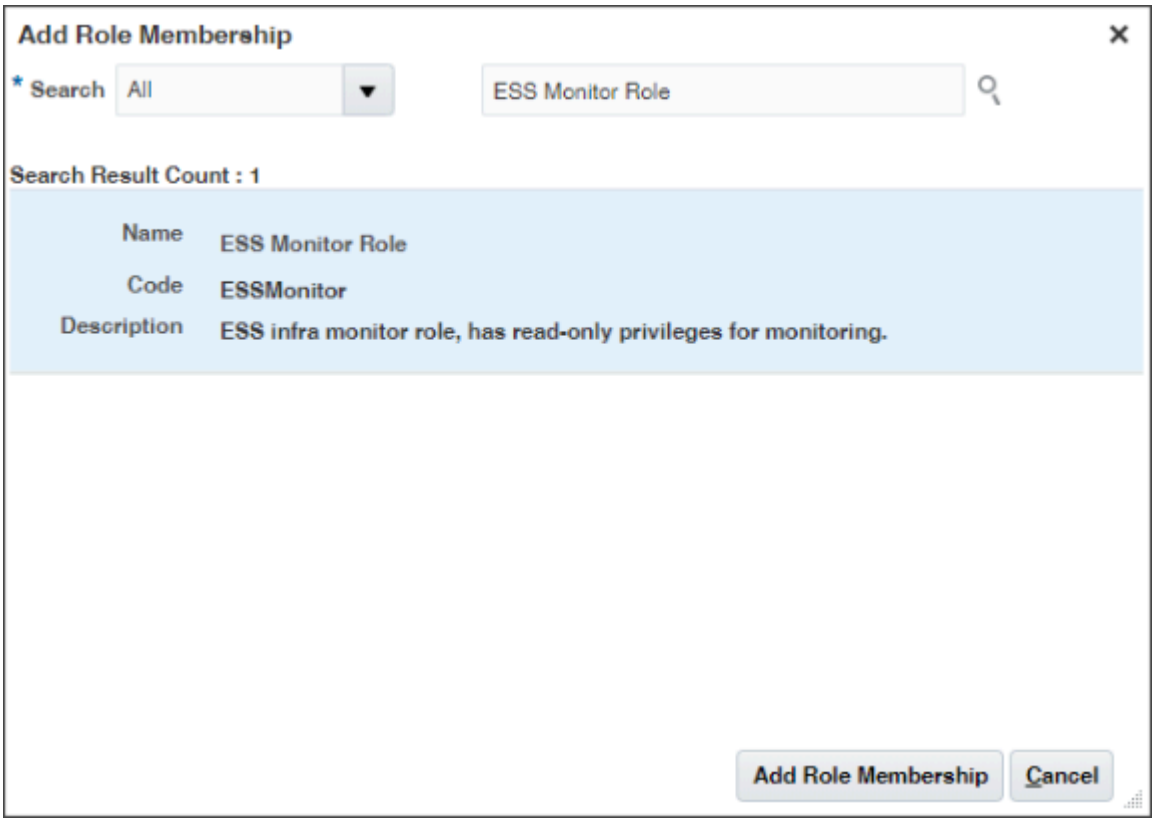
4. In the Create Role: Basic Information step, make the following entries:

Field	Suggested Entry
Role Name	Monitor ESS Processes
Role Code	MonitorESSProcesses
Role Category	Common -Abstract Roles

5. Click the **Role Hierarchy** step.



6. Click **Add Role**.
7. In the Add Role Membership window, search for **ESS Monitor Role** and click **Add Role Membership**.



8. Click **Cancel** to close the Add Role Membership window.
9. Click the **Users** step.
10. Click **Add User** and add all of the setup users by searching for each by name and clicking **Add User to Role**.
11. Click **Cancel** when you are done.

    The Users step should list all of the users you added.
12. Click **Next** to get to the **Summary and Impact Report** step.

13. Click **Save and Close**.

    The users you added to the role can now monitor all of the scheduled processes in the **Schedule Processes** work area.

3 Accounting Calendar

How the Accounting Calendar Impacts Forecasting and Other Sales Features

The accounting calendar defines the start and end of your fiscal year and the time periods in that calendar, including the exact dates for each time period. Your sales application uses these defined periods, often called enterprise periods, for multiple purposes.

Here are some examples:

- Reports that provide amounts by enterprise period, such as a sales pipeline analysis
- Metrics calculations by period for territory analysis
- The ability to adjust forecast amounts by time period
- Distribution of quota amounts by time period

The period frequency set in your fiscal calendar is the shortest period you can use. Most sales organizations select monthly (the default setting in Setup Assistant). A monthly period frequency enables you to generate monthly forecasting windows that permit your organization to update quarterly forecasts. And you can break down activities and reports by month and summarize by quarter and year. If you set the period frequency to yearly, then you can create reports and activities for the year, but cannot break them down by month. If you set the period frequency to weekly, then you can perform activities and generate reports by week, quarter, and year, but not by month because the number of weeks varies by month.

Accounting Calendar Setup Tasks Setup Assistant Completes for You

The entries you make in Setup Assistant completes all of the tasks you need to create the accounting calendar and enable it for use in your sales application:

- Creates the accounting calendar itself.
- Creates the forecasting periods for five years from the year you entered.
- Enables the calendar for use by setting the profile Accounting Calendar Default.
- Enables the calendar to be used in analytics and report by running the Refresh Denormalized Time Dimension Table for BI process.

Follow the procedures in this chapter to review the accounting calendar that was created for you and, if required, to create additional forecast periods in the future.

Review the Accounting Calendar and Generate Additional Forecasting Periods

You can review the accounting calendar Setup Assistant created for you. Optionally, you can generate forecasting periods for additional years in the future in your review.

If you need to make other changes to the accounting calendar, if you need to start the calendar in an earlier year, for example, then you must create a new accounting calendar. See the *Create the Accounting Calendar* topic in the Implementation Reference guide. You can't create a different accounting calendar after you start using your calendar for forecasting and reporting.

1. In Setup and Maintenance, go to the following:
    - Offering: Sales
    - Functional Area: Company Profile
    - Task: Manage Accounting Calendars
2. On the Manage Accounting Calendars page, click the name of the calendar created for you by Setup Assistant.
3. The Edit Accounting Calendar page displays the periods created for you by year from the starting date you entered in Setup Assistant. You can change the year format and generate periods for additional years.
4. Here's how to generate periods for additional years. For each year, do the following:
    a. On the Edit Accounting Calendar page, click **Add Year**.
    b. Click **Save**.
5. When you complete adding all the years, click **Save and Close**.
6. Click **Done**.

Related Topics

- Create the Accounting Calendar

4 Geography Data

Setup Overview

Import and set up reference geography data for the countries where you do business. Importing the reference geography data makes it possible for you to set up validation for address elements such as states and cities to prevent address data entry errors.

For example, if you're setting up sales territories by states in the US, it's a good idea to have salespeople select the states from a list rather than entering them manually. Preventing address entry errors ensures that the accounts are assigned to the correct territory and that opportunities are included in forecasts. If you subscribe to the Oracle Address, Email, and Phone Verification service, you don't really need the validation. Using the service, salespeople can look up and enter valid addresses for most countries in the world at a fraction of a penny a piece. However, it's a good idea to import and set up the geography data anyway. An extra bit of validation can't hurt. Besides, the geography data you import is a shared resource that's used by HCM, supply chain, and financials cloud services, and it's free!

Oracle licenses geography data from Loqate that you can import, at no additional cost. Alternatively, you can license geography data from another supplier and import it from a file. For more information about importing third-party geography data, see the guide Understanding Import and Export Management for CX Sales and Fusion Service.

Here's the list of the setup tasks. You can open the tasks from the Sales offering in the Setup and Maintenance work area. Tasks are organized by functional areas. Remember that you may have to show All Tasks to see the task that you want.

Step	Description	Functional Area and Task Name	Where to Get More Details
1	You can import the geography of up to 3 countries at a time using the Setup Assistant. You can also import countries using the Manage Geographies task.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Geographies**	*Overview of Geographies Import Geography Reference Data*
2	For the countries you imported, you can enable validation and lists of values for address elements such as states. When you enable validation on an address element, the application suggests alternatives during address entry. Enabling a list of values requires the user to make a selection from a list. Both validation and lists of values are enforced in the UIs.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Geographies**	*Set Up Geography Validation*
3	The validation affects entries made in the application UI only. You must set the profile option Geography	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Administrator Profile Values**	*Set Up Geography Validation*

Step	Description	Functional Area and Task Name	Where to Get More Details
	Address Validation Enabled to Yes to validate addresses you import.		
4	Enable the mapping of account and contact addresses for each of the countries that you import. With mapping enabled, salespeople on the go can view their contacts on a map and obtain directions on their mobile phones with the click of a button. If you selected the geocoding option for a country in Setup Assistant, you can skip this step. Selecting geocoding for one country, enables it only for that country.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Geographies**	*Enable Address Mapping*

Setup Assistant and Geography Data

Using Setup Assistant, you can import the geography data for up to three countries at a time. Here's an explanation of what geography setups Setup Assistant completes for you and which you must complete manually as described in this chapter.

What Setup Assistant Does for You

- Imports the geography data for up to three countries each time you run it.
- Enables the mapping of addresses for a specific country when you select the Geocoding option for that country.
- If you selected the Geocoding option for any country, the application schedules the Populate Location Latitude and Longitude Information process to automatically generate geographic coordinates from addresses. Oracle CX Sales Mobile and other applications use this to put addresses on a map.

What You Must Complete Manually

- You must set up validation for address elements that you are using for sales territory assignment.

  If you're assigning accounts to salespeople by state, for example, having a list of values for States ensures that salespeople don't make mistakes during manual address entry.
- Import geographies for additional countries.
- Enable geocoding for additional countries.
- If you didn't turn on geocoding in Setup Assistant, you must run the Populate Location Latitude and Longitude Process on a regular schedule.

Import Geography Reference Data

Here's how to import geography reference data licensed by Oracle.

1. In Setup and Maintenance, go to: **Sales offering** > **Sales Foundation functional area** > **Manage Geographies task**.
2. In the Manage Geographies page, enter either the country name in the **Country Name** field or the two-letter ISO code of the country in the **Country Code** field.

   Examples of ISO country codes include `US` (United States) and `AT` (Austria).
3. Click **Search**.
4. Select the country in the search results. Don't click the link.
5. Select **Import Geography Data** from the **Actions** menu.

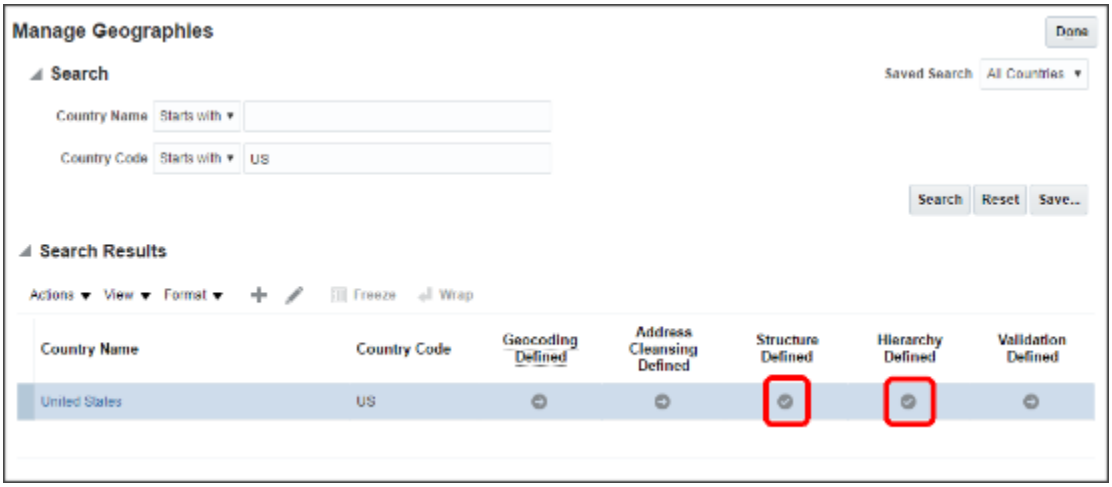
   > **Note:** The Import Geography Data action is disabled if the country isn't available from Loqate or if the country data is already imported.

6. Click **OK** to close the warning message.
7. Click **OK** to close the confirmation message.

The import of larger countries might require several hours to complete. You can track the progress of the import process by selecting **Scheduled Processes** from the Navigator menu.

After the import completes successfully, the **Completed** icon (check mark) replaces **Go to Task** icon in the **Structure Defined** and **Hierarchy Defined** columns on the Manage Geographies page.

Here's a screenshot of the Manage Geographies page with the Completed icons (check marks) highlighted.



The **Geocoding Defined** and **Address Cleansing Defined** columns are used for additional features that you set up separately:

- Geocoding enables mapping features in your application, such as the display of customer locations on a map in the UI. For details, see the Enable Address Mapping topic.
- Address cleansing makes it possible to validate addresses down to the street level. Address cleansing requires you to obtain a separate license for the Address Verification Cloud Service.

Note: The geography data is provided by Loqate is third-party content. As per Oracle policy, this software and documentation may provide access to or information on content and services from third parties. Oracle and its affiliates aren't responsible for and expressly disclaim all warranties of any kind with respect to third-party content and services. Oracle and its affiliates aren't responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.Report any issues with Loqate data to Oracle Support who will contact the appropriate team for correction. Alternatively, you can make manual changes to the geography data by using the Manage Geographies task in the Setup and Maintenance work area.

Related Topics

List of Available Countries with Loqate Geography Reference Data

Oracle Applications Cloud provides third-party Loqate geography data for import. Here's the list of countries for which the Loqate geography data is available for import.

Country Name	Country Code
Andorra	AD
Angola	AO
Argentina	AR
Australia	AU
Austria	AT
Belgium	BE
Bolivia	BO
Bosnia and Herzegovina	BA
Brazil	BR
Bulgaria	BG
Canada	CA
Cayman Islands	KY

Country Name	Country Code
Chile	CL
China	CN
Croatia	HR
Cuba	CU
Cyprus	CY
Czech Republic	CZ
Denmark	DK
Dominican Republic	DO
Ecuador	EC
Estonia	EE
Finland	FI
France	FR
Germany	DE
Great Britain	GB
Greece	GR
Guadalupe	GP
Guam	GU
Guernsey	GG
Hungary	HU
Iceland	IS
India	IN

Country Name	Country Code
Indonesia	ID
Ireland	IE
Isles of Man	IM
Israel	IL
Italy	IT
Jamaica	JM
Japan	JP
Jordan	JO
Kenya	KE
Latvia	LV
Liechtenstein	LI
Lithuania	LT
Luxembourg	LU
Malaysia	MY
Malta	MT
Martinique	MQ
Mexico	MX
Netherlands	NL
New Zealand	NZ
Norway	NO
Oman	OM

Country Name	Country Code
Peru	PE
Poland	PL
Portugal	PT
Puerto Rico	PR
Qatar	QA
Reunion Island	RE
Romania	RO
Russia	RU
San Marino	SM
Singapore	SG
Slovakia	SK
Slovenia	SI
South Africa	ZA
South Korea	KR
Spain	ES
Sri Lanka	LK
Swaziland	SZ
Sweden	SE
Switzerland	CH
Taiwan	TW
Thailand	TH

Country Name	Country Code
Tunisia	TN
Turkey	TR
United Arab Emirates	AE
United States	US
Uruguay	UY
Vatican City	VA
Vietnam	VN

Set Up Geography Validation

Set up geography validation for those geography elements that you plan to use in your sales territories to prevent data entry errors. By default, application enforces the validation you specify for creating addresses in the UI only, so you must turn the validation on for import.

Set Up Validation

1. Open the **Manage Geographies** task from the Setup and Maintenance work area using the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Geographies
2. On the Manage Geographies page, search for each country you imported using either its name or its two letter ISO code. For example, you can search by entering either the country name United States or the two letter ISO code US, and clicking **Search**.
3. Select the country in the Search Results area.

4. Click **Go to Task** in the **Validation Defined** column.

   Here's a screenshot of the Manage Geographies page highlighting the Go to Task icon in the Validation Defined column.

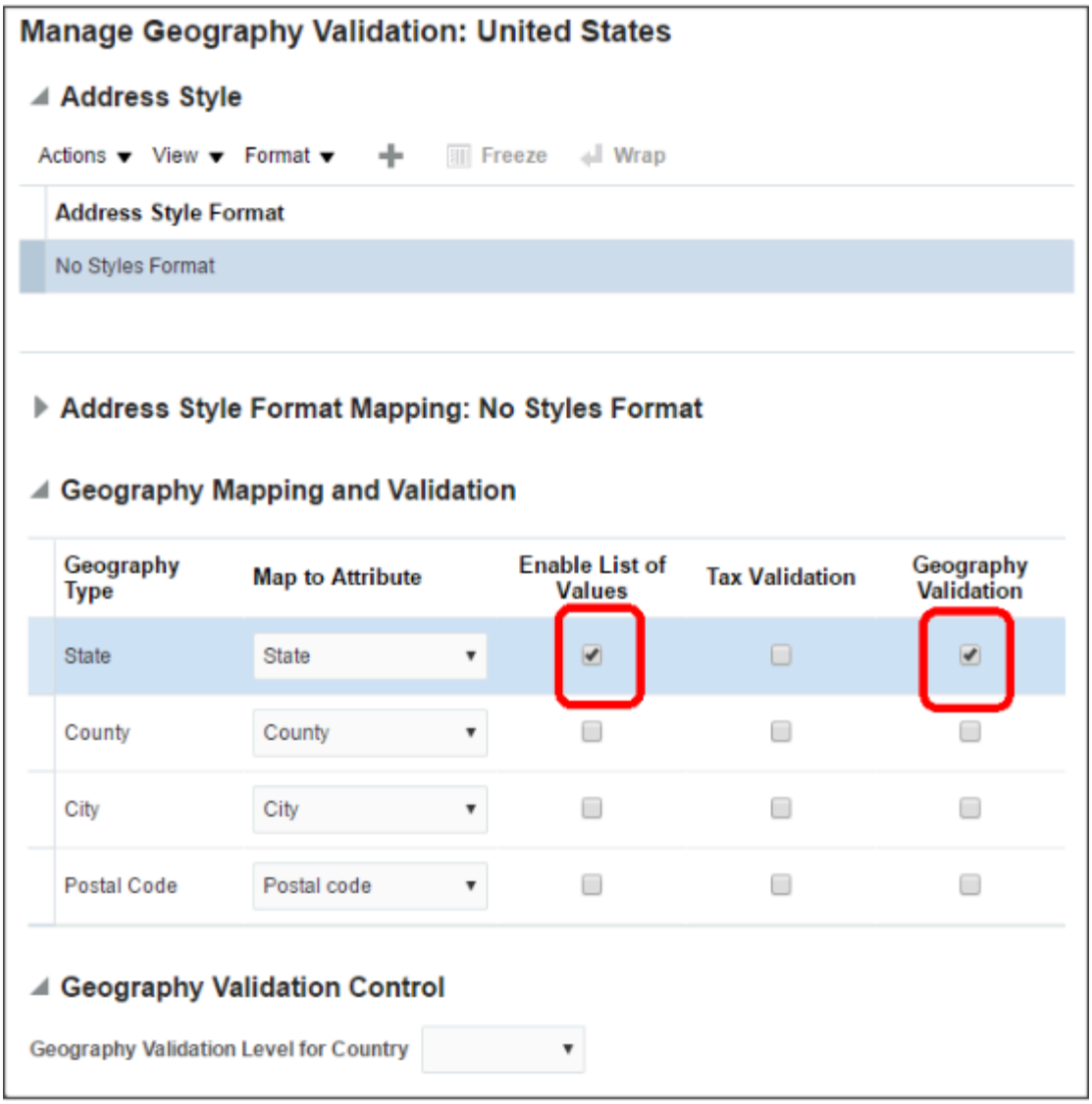
5. On the Manage Geography Validation page. Address Style section, ensure that the **No Styles Format** address style is selected. Defining validation for the No Styles Format address style ensures that the validations are performed for all addresses in the country.
6. Select **Enable List of Values** in the Geography Mapping and Validation section to display a list of values during address entry in the UI. For example, to have users select states from a list, select **Enable List of Values** for State.

   Vision Corp. enables the list of values for **State**. The company uses states for its sales territories and wants to ensure that state names are always entered correctly.

7. Select **Geography Validation** for all the geography types that you plan to use in territories.

   In our example, Vision Corp. plans to set up sales territories by state, so it selects **Geography Validation** for **State**.

   Here's a screenshot of the Manage Geography Validation page highlighting the location of the Enable List of Values and Geography Validation options for the US State geography type.



Note: If you don't select the validation for an address element, the application still suggests values during address entry. It just doesn't validate the address element.

8. Specify if you want to allow users to save incomplete or invalid addresses by making a selection from the **Geography Validation Level for Country** list.
    - **No validation**: permits users to save incomplete or incorrect addresses.
    - **Error**: permits only valid addresses to be saved.

    Vision Corp. wants to save all addresses, including incomplete and invalid addresses, so it selects **No validation**.
9. Click **Save and Close**.
10. Click **Done** in the Manage Geographies page.

Turn On Validation for Address Import

You must set a system profile option Geography Address Validation Enabled to Yes for the validation to be enforced during import.

1. Open the **Manage Administrator Profile Values** task from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. On the Manage Administrator Profile Values page, search for the profile option by entering `Geography Address Validation Enabled` in the **Profile Display Name**.
3. Select **Yes** as the **Profile Value**.
4. Click **Save and Close**.

Enable Address Mapping

You can quite literally put your accounts and contacts on the map by enabling geocoding as described in this topic. Geocoding turns the addresses you enter or import into longitude and latitude coordinates so that the locations can be displayed on a map.

Enabling address mapping involves two steps:

1. You enable the generation of geographic coordinates for a country
2. You run a process that converts the addresses into geographic coordinates

Salespeople must enter valid postal addresses for geocoding to work, so it's a good idea for you to validate the addresses in your application by subscribing to Oracle Address Verification Cloud Service.

What You're Enabling

Salespeople benefit from geocoding in two ways:

- In the office, salespeople can view the location of an account address on the map while editing the account record.

- Using Oracle CX Sales Mobile on their smart phones, salespeople can view a map showing the locations of accounts and contacts within a certain radius of their current location, or any other location they choose.

They can obtain travel directions to any of the locations with the tap of a finger (CX Sales Mobile passes the coordinates to the native mapping application on the phone).

Turn on Geocoding on the Manage Geographies Page

To turn on geocoding for a country, all you need to do is select the **Geocoding Defined** icon for the country where you want to turn it on. Here are the steps:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Geographies

2. On the Manage Geographies page, search for a country you imported using either its name or its two letter ISO code. For example, you can search by entering either the country name United States or the two letter ISO code US, and clicking **Search**.
3. Click the **Geocoding Defined** icon.
4. Click **Done**

Run the Populate Location Latitude and Longitude Process

Run the process that converts the addresses to the location latitude and longitude regularly and each time you import. Addresses that salespeople enter or addresses that you import don't show up on the map until the process completes, so schedule the process to run as frequently as necessary. If you imported geography data using Setup Assistant and turned on geocoding for any country, the process is already scheduled to run for you. Here's how to run the process:

1. In the Navigator, click **Scheduled Processes** under the **Tools** heading.
2. Click **Schedule New Process**.
3. Click the **Name** drop-down list icon and the **Search** link at the bottom of the list.
4. In the Search and Select: Name window, search for "Populate Location Latitude and Longitude Information".
5. Select the process name in the search results and click **OK**.
6. In the Schedule new Process dialog box, click **OK** to confirm your selection.
7. In the Process Details window, click **Advanced** to view the advanced options.
8. You can make the following entries on the Parameters Tab:

Parameter	What to Enter
Country Code	Leave this field blank if you want to generate the coordinates for all the countries you enabled for geocoding, or enter a specific country code.
Start Date, End Date, and Regenerate Geocode	Leave these fields blank. The geocoding process picks up any addresses that have not been geocoded previously.
Batch Size	Leave this field blank unless you're geocoding more than 50,000 addresses at a time. If you're processing a large number of addresses, then enter 1000. By default, the application launches a subprocess for each batch of 500 addresses. There's a maximum of 10 subprocesses, so, if you're processing more than 50,000 addresses, then you must run the process multiple times. You can increase the batch size up to a maximum of 1,000.

9. Schedule the process to run regularly:
    a. Click the **Schedule** tab.
    b. Select **Using a Schedule** and specify the frequency.
10. Click **Submit**.

    The application confirms your process was submitted.
11. You can monitor the process completion on the Overview page.

    The process spawns multiple processes, depending on the batch size and the number of addresses you need to process.

5 Search

Overview of Optional Setup for Adaptive Search

In this chapter, you learn about optional setups: how to make additional keywords available for search in both classic and Redwood UIs, for example. This chapter assumes you've completed the steps outlined in the playbook *How do I configure Adaptive Search?* first. If you use Setup Assistant for your initial setup, it enables the Adaptive Search configuration provided by Oracle for the objects that you selected.

For additional advanced configuration and for information on how to configure search in individual work areas, see the Adaptive Search and Workspace chapter in the Implementation Reference guide.

Here's a list of optional tasks that you can use to configure the way search works in your application:

Step	Applies To	Description	Navigation	Where to Get More Details
1	Both Redwood and Classic Sales	By default, Adaptive Search is configured for keyword search on all the important fields. However, you can make additional fields searchable both in Sales for Redwood UIs and in Classic Sales UIs, including global search and Workspace.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **All Tasks** > **Configure Adaptive Search** > **Setup** > **Advanced**	See the topic: *Make Additional Fields Searchable*
2	Sales for Redwood	Configure the list of values that use Adaptive Search, called Smart Pickers.	Configuration done in VB Studio.	See the topic *Configure the Picker* .
3	Sales for Redwood and Classic Sales	Configure what shows up in list of prioritized recent items, called Smart Lists. For example, you can specify how long to keep the items in smart lists if they aren't acted on and how frequently the lists are refreshed.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Administrator Profile Values**	See the topic: *Change the Behavior of the Show Smart List Filter*
4	Classic Sales	For Global Search, a feature available only in Classic Sales, you can restrict the number of the objects that can be searched. By default, all of the objects you enabled in Adaptive Search are automatically searchable from the Global Search box at the top of the	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **All Tasks** > **Configure Adaptive Search** > **Configure Global Search**	See the topic: *Configure Global Search Scope and Display of Search Results*

Step	Applies To	Description	Navigation	Where to Get More Details
		page. If you enabled the Partner object, for example, a salesperson searching for the name "Pinnacle", gets both the accounts and partners named Pinnacle.		
5	Classic Sales	Optionally, you can configure the way the global search UI appears to salespeople by creating your own configuration for Classic Sales. For example, you can change which suggestions display when you click in the search box and which objects get displayed in search results by default.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **All Tasks** > **Manage Global Search Configurations**	See the topics: • *Global Search UI* • *Configure Global Search UIs*

Related Topics

Adaptive Search and Workspace

Oracle is completing the process of replacing the CRM search technology with Adaptive Search, a high-performance search engine that provides keyword searching and enhanced filtering capabilities. Sales in Redwood UIs and features rely exclusively on Adaptive Search. In Classic Sales, some work areas still rely on legacy CRM Search technology.

By default, all customers now have Adaptive Search enabled automatically for Accounts and Contacts. You can enable other objects using Setup Assistant or manually. Not all the available objects are sales objects. For example, Partner and Partner Contact are only pertinent for Partner Relationship Management. HR Help Desk Request, Installed Base Asset, Internal Service Request, and Service Request are specific to Fusion Service. Adaptive Search is also available on custom objects or child objects you create.

Here's where you can use Adaptive Search:

- All Sales in Redwood UIs
- Workspace in Classic Sales

  A work area where salespeople can work on all of the available business objects at the same time.
- Work areas for individual business objects in Classic Sales.
- Global Search in Classic Sales

  This is the keyword search available at the top of the page in Classic Sales.
- REST APIs

Note: Many customers run their applications and Oracle Databases in their own data centers on Oracle Cloud@Customer. Currently, Cloud@Customer pods or government pods don't support Adaptive search.

Use Setup Assistant to Enable Search

Setup Assistant sets up everything your sales organization needs to start using Adaptive Search for standard objects in Oracle Sales.

What Setup Assistant Does for You

- Enables the objects you selected for Adaptive Search and runs the indexing process at the recommended intervals. The Setup Assistant enables the search configuration provided by Oracle. Adaptive Search is the search technology that powers all Oracle Sales in the Redwood User Experience searches, including smart pickers. It's also the search technology used for most Classic Sales features, including Workspace, individual work areas, Workspace infolets, Global Search, and REST APIs.
- The Setup Assistant also sets up the search for work areas that still use the legacy CRM-specific search technology:
    - Enables the work area searches in the work areas that don't yet use Adaptive Search.
    - Runs the Synchronize CRM Search Indexes process every 5 minutes. This process sets up the search index for work area searches.
    - Runs the Optimize CRM Search Indexes process weekly. This process keeps the work-area search index from getting fragmented.

    > **Note:** If your implementation requires indexing processes to run at different intervals, you must schedule the processes separately using individual tasks available from the Scheduled Processes page (**Navigator** > **Tools** > **Scheduled Processes)**. For details, see the topic Schedule Work Area Search Processes topic in the Implementation Reference guide.

What You Can Set Up Manually

- Modify the way global search works.
- Configure the way keyword searches work.
- Add or remove objects available in Adaptive Search.
- Create saved searches for the sales organization.

Search in Sales in Redwood and Classic Sales UIs

There are multiple ways to search in Sales in Redwood and Classic Sales.

List Pages in Sales in Redwood

Here's a brief overview of how salespeople search in the list pages in Sales in Redwood work areas.

1. They place the cursor in the search field and select a saved search as the starting point.

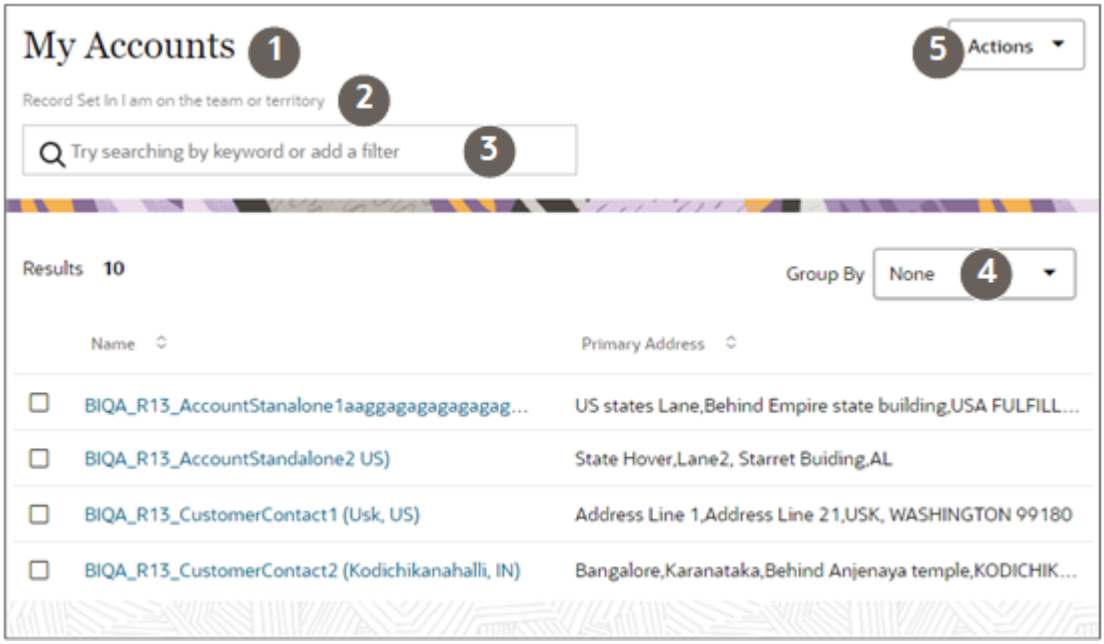
The selected saved search determines the breadth of the search. For example, the My Accounts saved search restricts the search to accounts where the salesperson is in the team or territory. The filters are displayed right above the search field.

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

        For more search options see the Using Sales in Redwood guide topics *Filter a List* and *Filter by Numbers and Dates*
    - Enter one or more keywords to search on and press return. Keywords can be words in the name or in related fields and objects. See the topic: *Search Using Keywords*.
3. Further configure the search results:
    - You can group your results by selecting the attribute you want to group by.
    - Change the columns displayed in the search results by clicking **Actions** (the three dots) and selecting **Manage Columns**.
    - Change the order of the columns by selecting and dragging.
    - Change the default sort order using the controls at the top of each column.
4. Click **Save** to save your search criteria and search result formats to create a saved search.

Sales in Redwood List Page Features

Callout Number	Description
1	Name of the saved search that's generating the list on the list page.
2	List of filters in the search.
3	Search bar where you select saved searches, and enter filters and search terms
4	Group search results
5	Take actions: • Save to create a new saved search • Export the list • Manage columns in list results • Sort to display most relevant records first

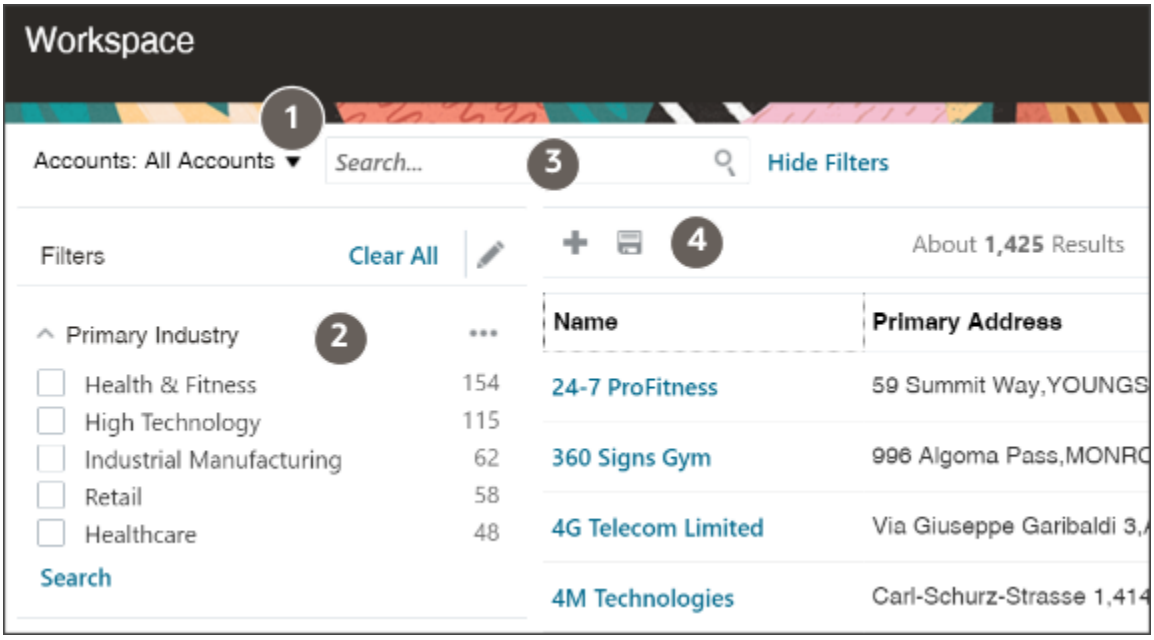


Search in Workspace and Work Areas in Classic Sales

For searches focused on one sales object and to explore sales data, you can use Workspace and the different work areas.

Here's an annotated screenshot of Workspace to explain how it works. (The search experience in the work areas targeted to single objects is exactly the same. You just can't switch objects.) :

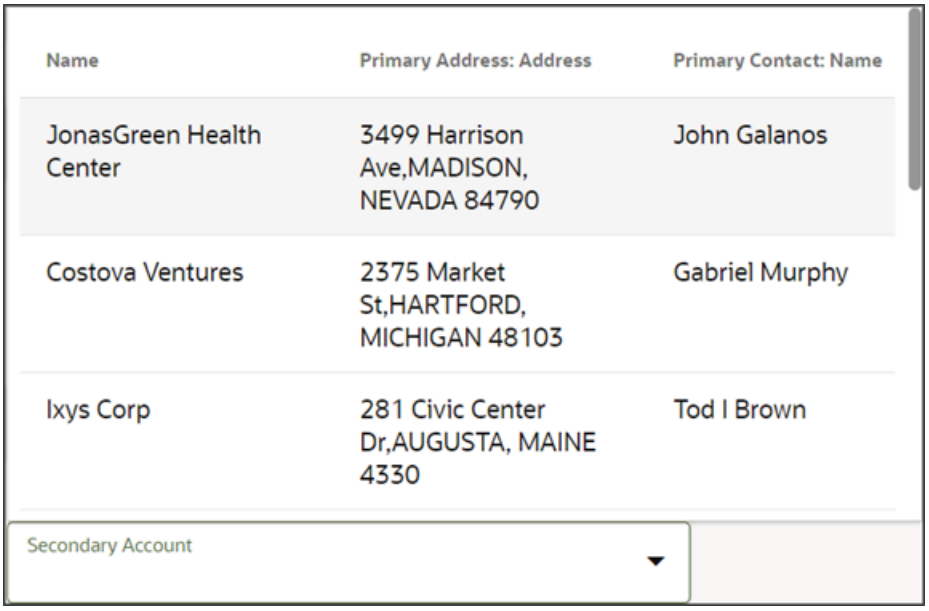
1. You select a particular saved search as your staring point (callout 1 in the screenshot).
2. Adding filters (callout 2) lets you explore the list along a particular dimension. When you add industry as a filter to a list of accounts, for example, you can see which industries have the most accounts and how many there are.
3. If you are looking for a specific record in the list, you can search by keyword (callout 3).
4. You can save your personalized search as a new search (callout 4).



Smart Pickers in Sales in Redwood

In Sales in Redwood, a smart picker is a special kind of search on a list of values. Smart pickers leverage your Adaptive Search setup so that users can quickly and easily find the record they're looking for. Adaptive Search makes it possible to search using attributes of related objects and you can create saved searches to narrow down the search to the items you want. For example, a salesperson searching for an account can search on the name of the contact, or the city where the account is located. Smart pickers also provide "type ahead keyword search", which means that search results appear as the user starts typing.

Here's an example of a smart picker:



Global Search in Classic Sales

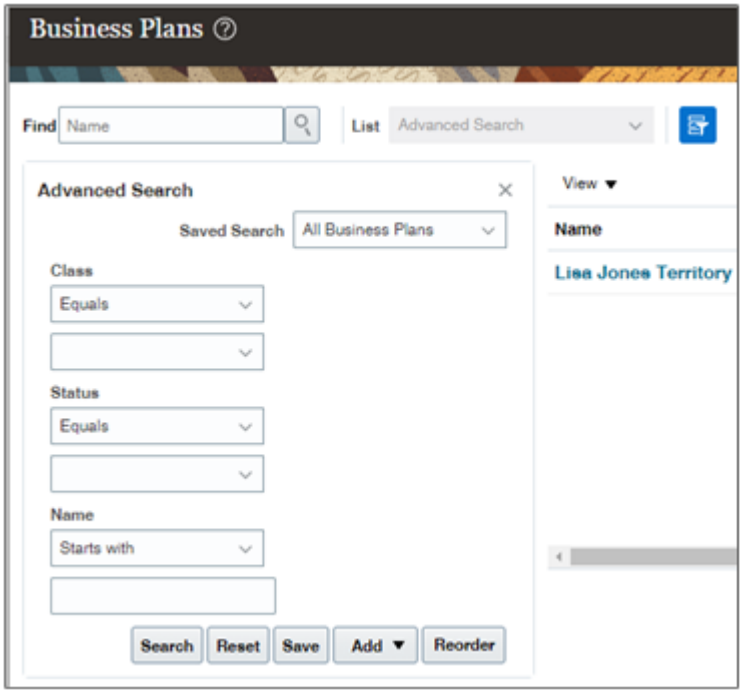
In Classic Sales, you can use the global search, located at the top of the application pages, to search by keyword across the different types of sales information. For example, searching using the keyword "Paris," finds all the contacts named Paris, as well as all the accounts, opportunities, leads, and other records Paris is associated with. You also get all of the records with Paris addresses. Global search makes it possible to search all records you have permission to view.

Global search uses the same Adaptive Search technology as Sales in Redwood, Workspace and work areas, but it supports keyword searches only.

Search in Work Areas That Still Use CRM Search

For Products, Business Plans, Service Requests, and Competitors work areas, salespeople can search either by record name or switch to an advanced search mode to search using multiple search criteria. The saved searches (lists) for the different work areas use a different technology from those you create for Adaptive Search, so you must set them up separately.

To highlight the differences in UI features, here's a screenshot of the Advanced Search panel in the Business Plans work area landing page, a work area with the legacy CRM search.



Search Type Differences

Here are the key differences between the two search types.

Search Technology Differences Overview

Search Properties	Adaptive Search	CRM Search
Where It's Used	All Sales for Redwood searches: including list pages, "smart pickers", and saved searches. In Classic Sales: Workspace, work areas powered by Adaptive Search, Infolets powered by Adaptive Search, and saved searches for these. Adaptive Search is also used in REST APIs. Global Search uses only Adaptive Search keyword searches.	Legacy work areas including Product, Business Plans, Service Requests, and Competitors. Note that you set up Saved Searches for legacy work areas separately because they use CRM Search.
Search Scope	In list pages, you select a saved search to set the scope of your search You can search using related information. For example, you can search for an account by contact name, address city, and owner.	In list pages, you select a saved search to set the scope of your search and search by name. You can use advanced search to search using multiple search criteria.
Indexing Frequency Until a new record is indexed, it's not available for search.	Records you create and update in the UI are automatically indexed and made searchable within seconds. Imported records or records updated by background processes aren't available for search until the process completes.	Both records that you create in the UI and those you import are available almost immediately. The indexing process usually runs every 5 minutes.
List of Recent Items Records you recently created, edited, or accessed, includes records that haven't been indexed yet.	You get a list of up to 10 most recent items for each object. In addition, selecting a Smart List, displays up to 50 items you recently accessed ranked by the number of times you accessed them.	Displays recent items when you place your cursor in the Search field.
Wildcards and Operators	Use an asterisk (*) at the end or middle of a word to indicate missing letters and the question mark (?) to indicate a single missing letter. You can also use operators OR and NOT, and quotation marks (") for exact phrases. Adaptive Search also includes multiple numeric and text operators that you can use for advanced search. For example, you can search on a range of values, on all the words, and words in a specific order. You can also find records with no values.	Use a percent sign (%) at the beginning, end, or middle of a word to indicate missing letters.

Search Properties	Adaptive Search	CRM Search
Filters	Extensive ability to use filters to explore your data. For example, you see the most frequent values in a filter and how many records appear in each. For example, adding the primary industry as a filter when searching accounts, automatically displays the most frequent industries and the number of records for each. A search of opportunities using win probability as a filter, displays different ranges of win probabilities and the number of records in each range.	You can filter your results by adding new search terms and rerunning yours search.
Saved Searches	You can create personal saved searches and sales administrators can also create saved searches for different roles in the organization. Adaptive Search saved searches can be used in any feature powered by Adaptive Search. You can reuse Sales for Redwood saved searches in Workspace, in infolets powered by Adaptive Search and in Classic Sales Mobile.	You can create personal saved searches and sales administrators can create saved searches for different roles. Because the saved searches are built on a different technology from Adaptive Search, you can't use them in UIs that use Adaptive Search, including Workspace and Sales for Redwood list pages.

How Salespeople Search and What You Can Configure

Here's how salespeople search with Adaptive Search and how you can modify the default behavior provided by Oracle.

How Salespeople Search in the UI	What Administrators Can Configure
Selecting a saved search displays a list that matches the saved search criteria and determines the scope of any search you perform on the page. For example, if you select All Accounts, you're searching all accounts you can view. If you select My Accounts, then you're searching only the accounts that you own.	You can create your own saved searches targeted to specific roles within the sales organization. And you can determine which saved search appears by default when salespeople open the UI. Salespeople can create their own personal saved searches and override the administrator defaults.
You can enter one or more search terms in the **Search** field. You can use related information for your searches. For an account, you can search by company name, the city where the account is located, or the primary contact at the company, for example. You can even search for an account by the name of the salesperson on the sales team. The search results match whole terms, but you can use the (*) wildcard for partial	You can enable or disable the attributes available for search. Oracle enables the most common attributes for you, but you must enable the search for any child objects and fields you create in Application Composer.

How Salespeople Search in the UI	What Administrators Can Configure
words and use operators, including NOT, OR, and Between for date ranges.	
You can view the filters used in the saved search by clicking the **Show Filters** link. You can also add filters of your own.	You can specify which additional fields users can add as filters and you can set up groupings of values the filters show. For example, you can break down opportunities by revenue ranges: 0 to 10,000, 10, 000 to 100,000, 100,000 to 500,000, and 500,000 and up.
Filters show the most common values and the number of records in each. For example, a search of accounts with the primary industry as a filter, automatically displays the most frequent industries and the number of records for each. A search of opportunities using win probability as a filter, displays different ranges of win probabilities and the number of records in each range. Your filter selections are additive, if you select Health Care as the primary industry and then Lisa Jones as the owner, Workspace displays only those Health Care accounts Lisa owns.	You can configure value ranges for numeric, corporate currency, percent, and date filters. For example, you can configure value ranges for the opportunity win probability filter and other similar filters.
Salespeople can save any search criteria they enter as their own personal saved search.	You can create saved searches for use by the whole sales organization and you can tailor them to different roles. You can expose the saved searches as filters in Workspace infolets to display key sales information right on the home page.
Sales administrators and sales managers can download search results into an Excel spreadsheet.	You can remove the Export List button from the page using Application Composer. You can also enable other custom sales roles to use the button, by granting the privilege ZCA_WORKSPACE_EXPORT.

Make Additional Fields Searchable

All of the key fields you need for search of standard objects are searchable (See the topic *Adaptive Search Configuration Provided by Oracle* for a list.)

However, you can enable additional fields for search, including custom ones. And you can remove existing fields from use. This example shows you how to enable the Chief Executive Name field. The field is a standard application text field, but the same procedure applies to any field, even a custom field on a standard application object. When you're done with this configuration and publish it, a salesperson can search on the CEO's name to find the account where the person is the CEO. The search also returns all of the opportunities for that account when you enable opportunities to be searched by account fields.

Suppose that you added the CEO name field to the Account UI and want to make entries in this field searchable.

Making the field searchable involves these steps:

1. Make the field searchable for its business object.

2. Optionally, you can enable the field for search of a related object.
3. You publish your configuration.
4. Enable the field for display in UIs as a column and a filter.

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

Make the Field Searchable in Its Business Object

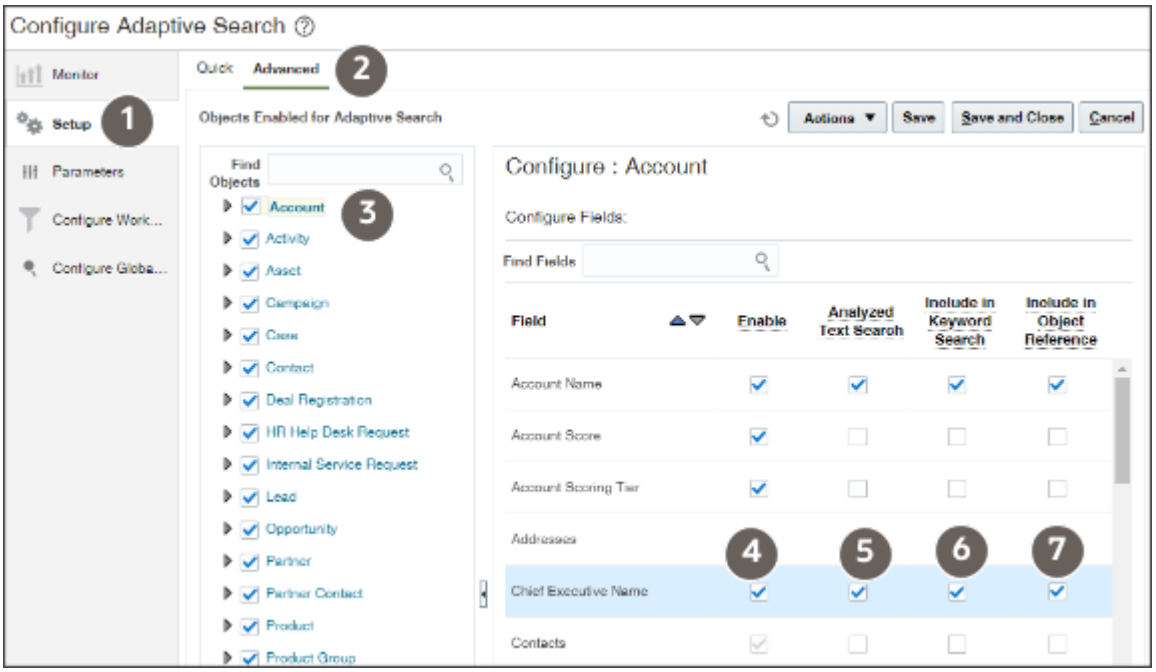
Here's how you make the field available for searching its business object. For example, making the account searchable by the CEO name.

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

    Note: If you receive a message that Application Composer changes are being synced, you must wait until the sync process completes before using the Setup tab. You can use other features of the application in the meantime.

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

    The field is listed in the Configure Fields section.



4. Select the **Enable** option to index the field for Workspace and Global Search (callout 4).

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

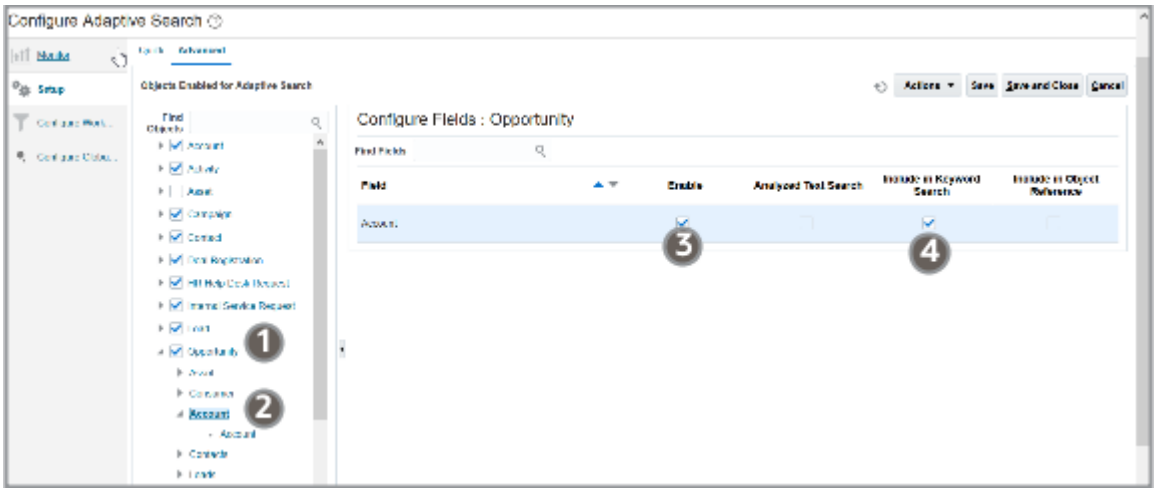
   If you leave this check box deselected, users can't search for accounts using the CEO name. But in Workspace, they can still add the Chief Executive Name field as a filter for accounts and search the field there. Global Search doesn't permit you to add filters, only to search by keyword.
7. Select the **Include in Object Reference** option to enable the field for search in related objects. Make the selection if you want to use the CEO name when searching for opportunities, for example.

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

Make the Field Available for Searching a Related Object

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

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



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

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

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

Use Case	Enable	Include in Keyword Search
Users can search on the field using Global Search and in the Workspace Search box.	Selected	Selected

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

Change the Behavior of the Show Smart List Filter

Overview of the Show Smart List Filter

Salespeople can reduce the amount of navigation and clicking during searches by adding the **Show Smart List** filter to the Ask Oracle bar on any list page. The filter displays a list of the most relevant records based on a calculated score. The records with higher scores appear higher in the list.

For example, adding the filter on the Accounts list page, displays a list of accounts ranked by the number of times a salesperson has opened each account, its contacts, and its opportunities, and how recently they opened these. So, if today, a salesperson opens or updates account information on Acme four times, but only opens Pinnacle once, then Acme appears higher on the list than Pinnacle.

Here are some of the factors that affect the relevancy score:

- Recency: The last time a user interacted with the record.
- Frequency: How often a user interacts with the record.
- Favorites: If the user has marked the record as a favorite.
- Urgency: When an action is expected from a user, such as a task due tomorrow, an upcoming appointment, and so on.
- Related objects: Relevancy scores are boosted for related accounts, opportunities, or leads associated with overdue tasks and appointments.
- Event-based updates: For opportunities, updates to win probability, status, and sales stage boost the relevancy score.

The list of relevant records can display a maximum of 50 items. Items that haven't been touched for 30 days or another number specified in the **Relevancy Aging Maximum Number of Days** profile option get automatically taken off the list.

Supported Business Objects for Lists

Smart lists are derived from users' past and recent application touches and interactions with these business objects:

- Accounts
- Activities
- Contacts
- Leads
- Opportunities
- Partners
- Products and Product Groups

The My List for Accounts and for Other Objects

While salespeople can add the Show Smart List filter to any search on the list page, they can instead select the **My List for <object>** list (the object changes depending on the list page). Selecting the **My List for Accounts**, for example, automatically includes the filter and displays a list of the most relevant of all of the accounts the user can access.

Change the Behavior of the Show Smart List Filter

The Show Smart List filter is available automatically to salespeople as soon as they start working in the application. No setup is required. However, you can change the filter behavior in a few ways:

- Change how long untouched items are kept in the list, from the default of 30 days.
- Change the refresh rate of the lists from once every 3 hours to near real-time, 10-minute refresh intervals
- Change how often and when the lists are refreshed, to improve the user experience.

Change How Long to Keep Untouched Records in the List

By default, records are kept 30 days after they're accessed last. For example, if your organization has long sales cycles, then you might want to keep items on the list for a little longer.

You can change the number of days untouched records are kept in the list by setting the profile option, **Relevancy Aging Maximum Number of Days**:

1. In Setup and Maintenance, go to: **Sales offering** > **Sales Foundation Functional area:** > **Manage Administrator Profile Values task**.
2. In the Manage Administrator Profile Values page, search by the profile option name **Relevancy Aging Maximum Number of Days** or code ZCA_UC_AGING_CYCLE.
3. Set the profile option value to the desired number of days.
4. Save your changes.

Change the Refresh Rates of the Lists

You can change the refresh rates from once every 3 hours to near real-time, 10-minute refresh intervals, by setting the profile option, **Enable Near Real Time User Context Relevancy**:

1. In Setup and Maintenance, go to: **Sales offering** > **Sales Foundation Functional area:** > **Manage Administrator Profile Values task**.

2. In the Manage Administrator Profile Values page, search by the profile option name **Enable Near Real Time User Context Relevancy** or code ORA_ZCA_UC_ENABLE_NRT.
3. Change the profile option value from FALSE to Y to enable near real-time user contextual relevancy.
4. Save your changes.

Run the Processes with Different Frequencies and Schedules

You can change how often or when you run the two scheduled processes that generate the lists and remove untouched items from the lists:

- **Generate Relevancy Feed**
  Generates the lists by analyzing all records that have been updated in the last 24 hours. By default, this process runs every three hours.
- **Age User Context Relevancy Feed**
  Removes from the lists all items that haven't been accessed in the past 30 days (the number of days set in the profile option Relevancy Aging Maximum Number of Days). By default, this process runs once a day.

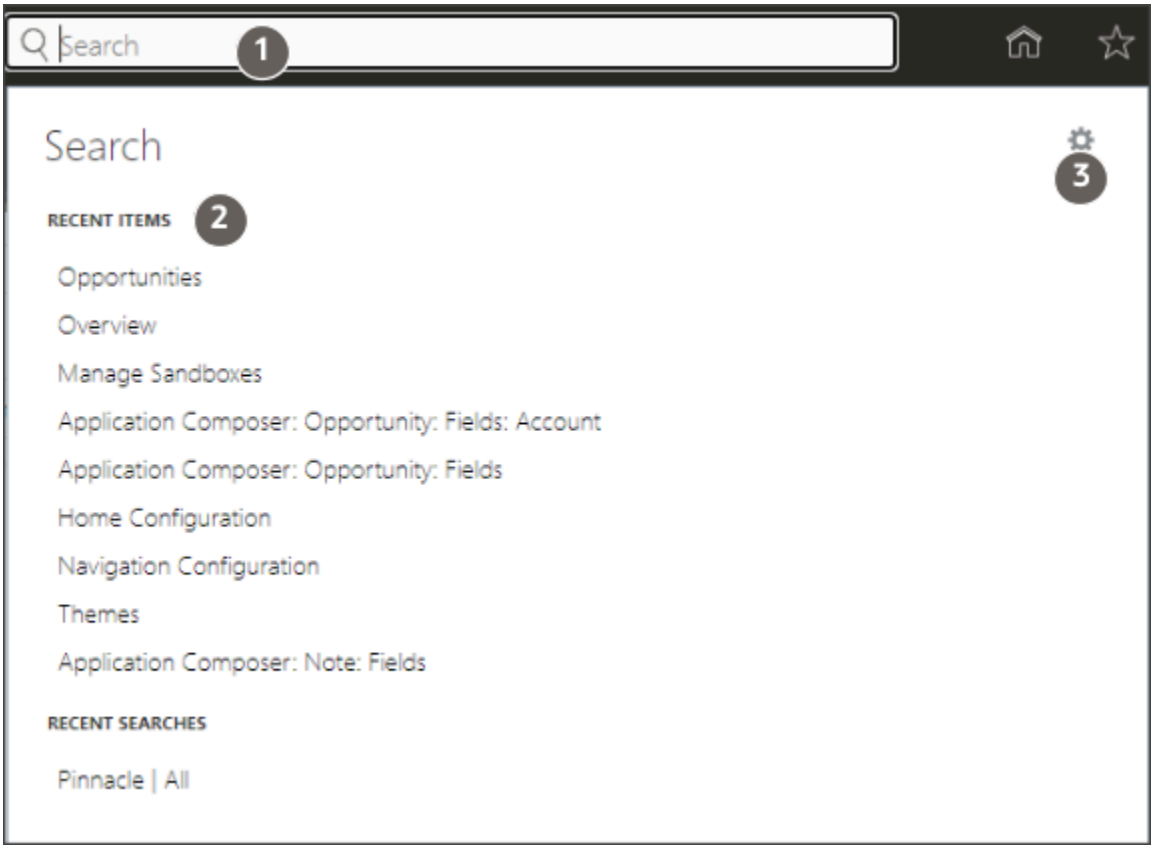
Classic Sales Search Setups

Global Search

Global Search UI

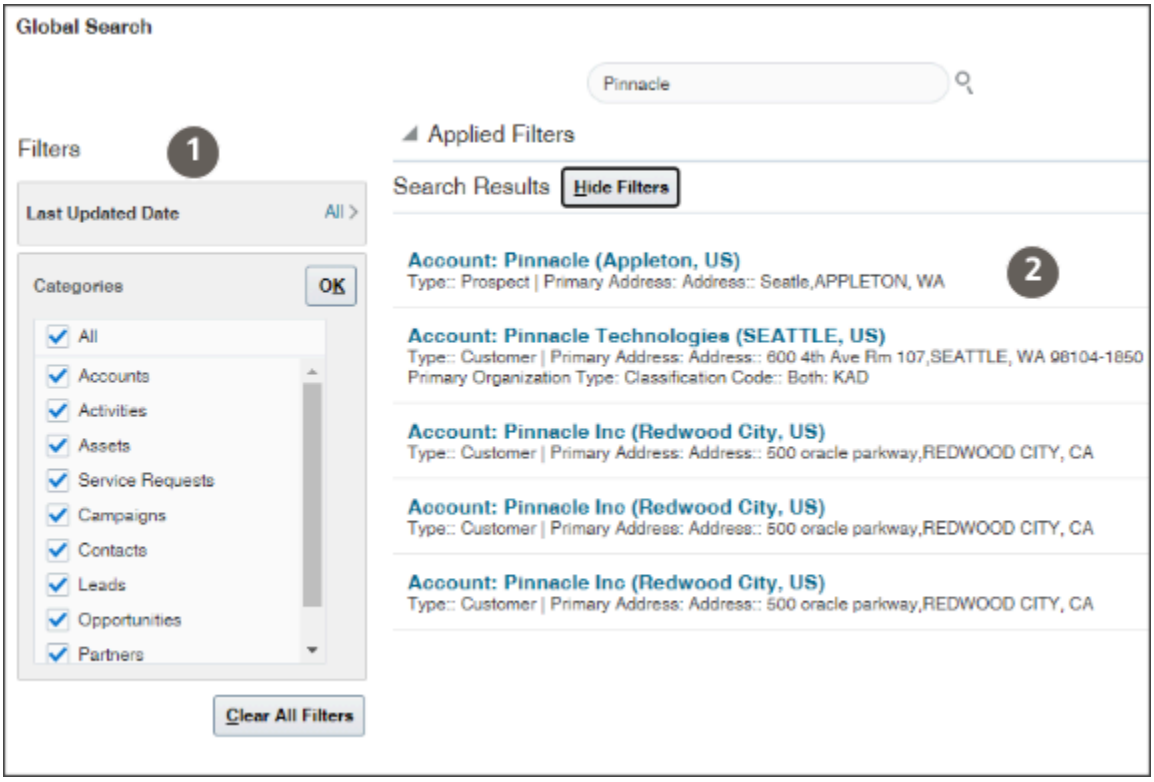
Global Search is the search box at the top of the page in the Classic Sales UIs. This feature isn't available in Sales for Redwood. Here's a summary how global search works and how you can configure it.

How It Works	What You Can Change
When salespeople click in the global search box (callout 1), the application suggests recent search terms, recent pages you visited, and other recent items. The items are organized in suggestions groups (callout 2). For example, under Recent Items, the application suggests recent pages you visited.	• Change the "Search" prompt in the global search box. • Specify which suggestion groups get displayed for users by default. For example, you may want to hide Recent Items and show Recent Searches first.
Salespeople can specify which suggestion categories they want to see and which categories of results are available in the search results, by clicking **Personalize** (callout 3), the application suggests recent items they worked on recently.	• Specify which suggestion groups are available for use. For example, instead of hiding Recent Items by default, you may want to remove it from use entirely so users can no longer display the category.
Salespeople enter keywords in the search box (callout 1) and press **Return** to search across different objects.	• You can specify which objects are available for global search and how the results are displayed. See the topic Configure Global Search Scope and Display of Search Results



Here's how the results get displayed after you enter your search term and press **Enter**.

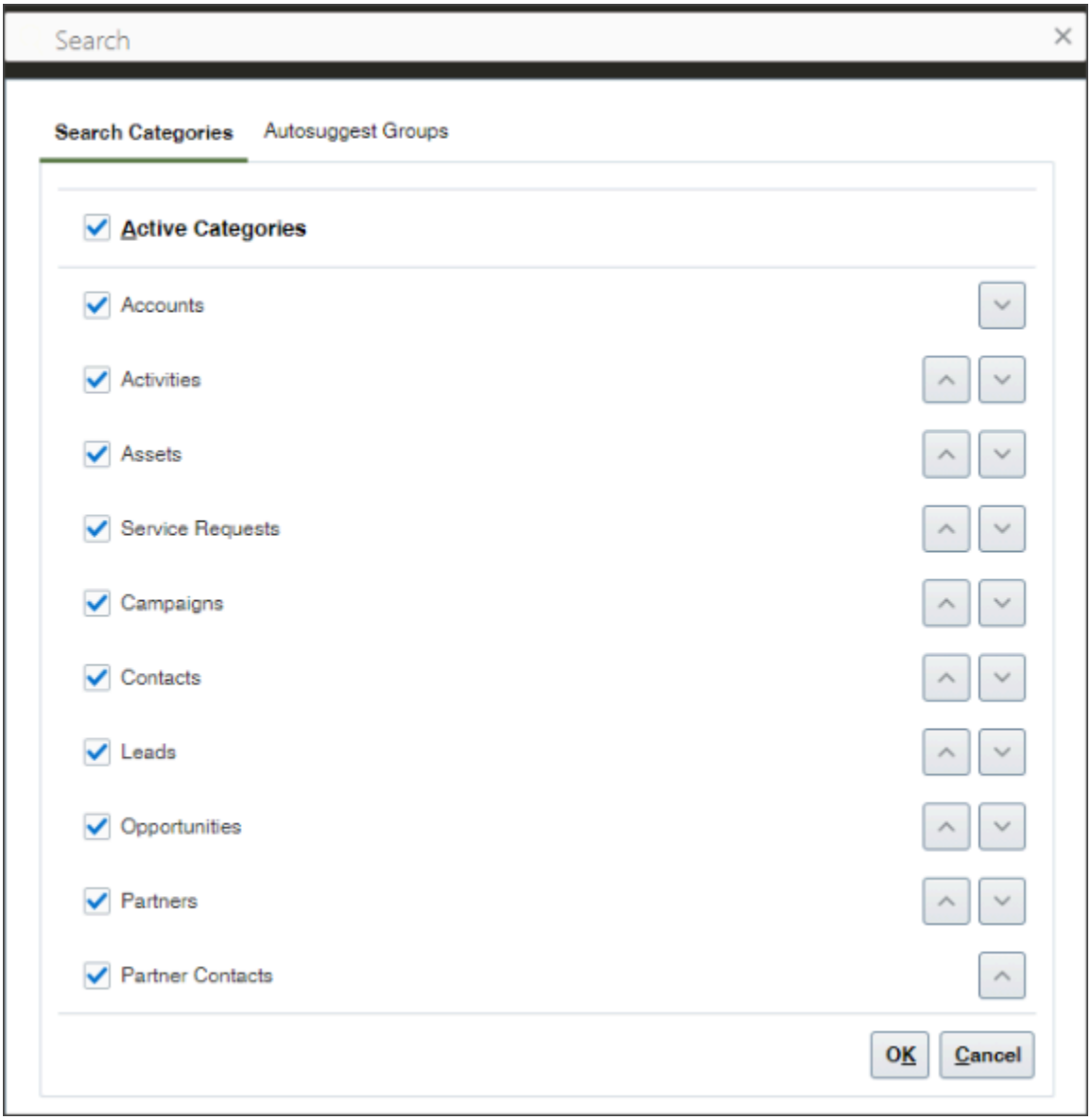
How It Works	What You Can Change
The results of the search show the objects that are enabled for global search during setup.	• You specify which objects are available for global search and how the results are displayed. See the topic Configure Global Search Scope and Display of Search Results
Salespeople click **Show Filters**, and select those objects they want to see in their search results (callout 1).	• The objects you selected for use in global search, show up as the available filters here. • You can specify which objects are selected by default.
Clicking on the first line of each search result opens the record for editing.	• By default, users drill down on the record name, but you can specify a different field as the title. • You can also specify which fields display in the two lines below the title in each search result.



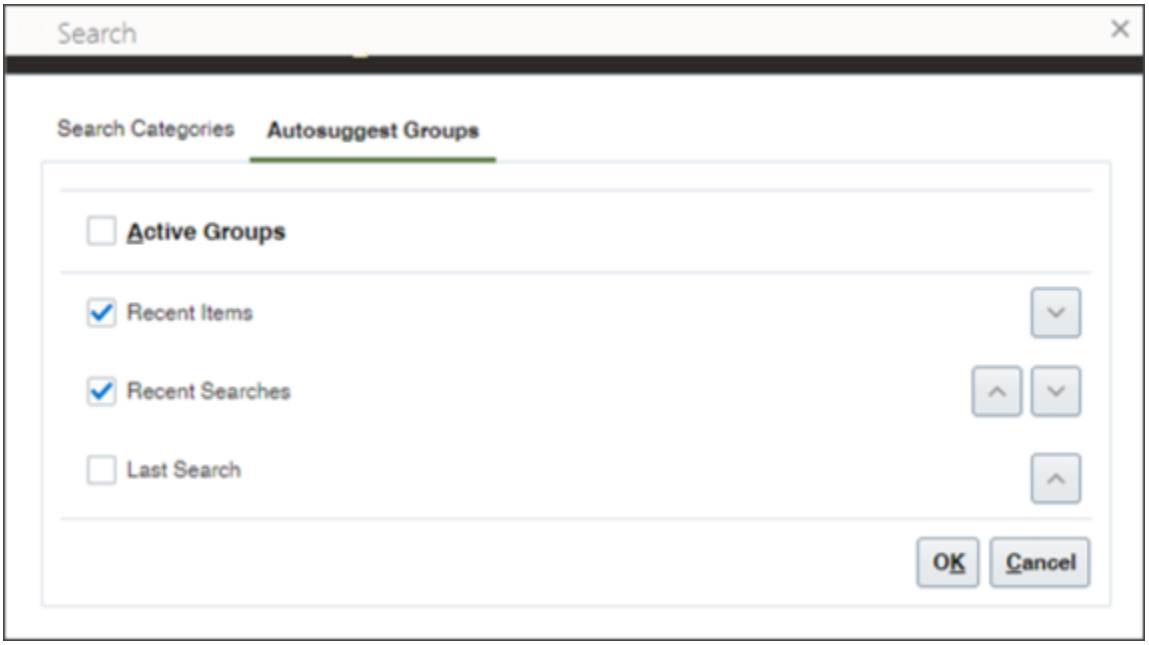
Salespeople can personalize their global searches by clicking **Personalize**. See the topic Configure Global Search and Result UIs to learn how to make changes in the default behavior.

How It Works	What You Can Change
Salespeople can specify which objects are included in search results and in which order.	• You can specify which objects are available for selection and which are enabled by default. • You can disable personalization of search categories.
Salespeople can specify which autosuggest groups show up and in which order when they click in the global search box.	• You can specify which autosuggest groups are available for display and which are enabled by default. • You can disable personalization of autosuggest groups.

Here's the Search Categories tab salespeople can use to select which objects (categories) are included in search results. Changing the order of results isn't supported.



Salespeople can control which Autosuggest Groups tab makes it possible to control the suggestions you get when you first click in the global search.



Related Topics

- Configure Global Search UIs

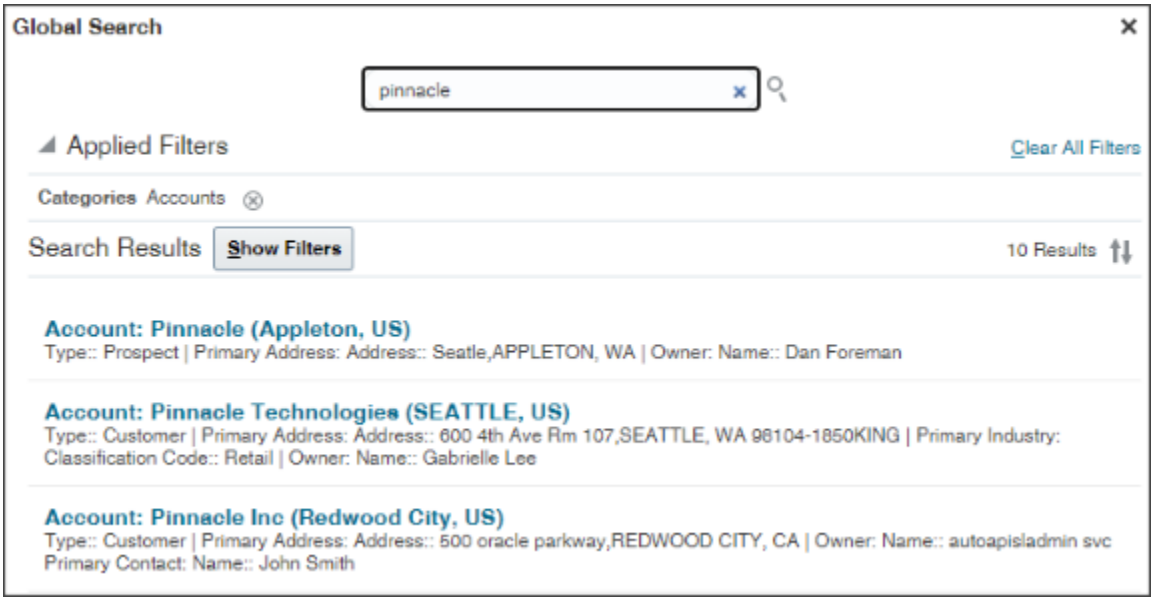
Configure Global Search Scope and Display of Search Results

You can specify which of the objects you enabled for Adaptive Search are searchable in Global Search and how the search results are displayed.

Each search result, includes:

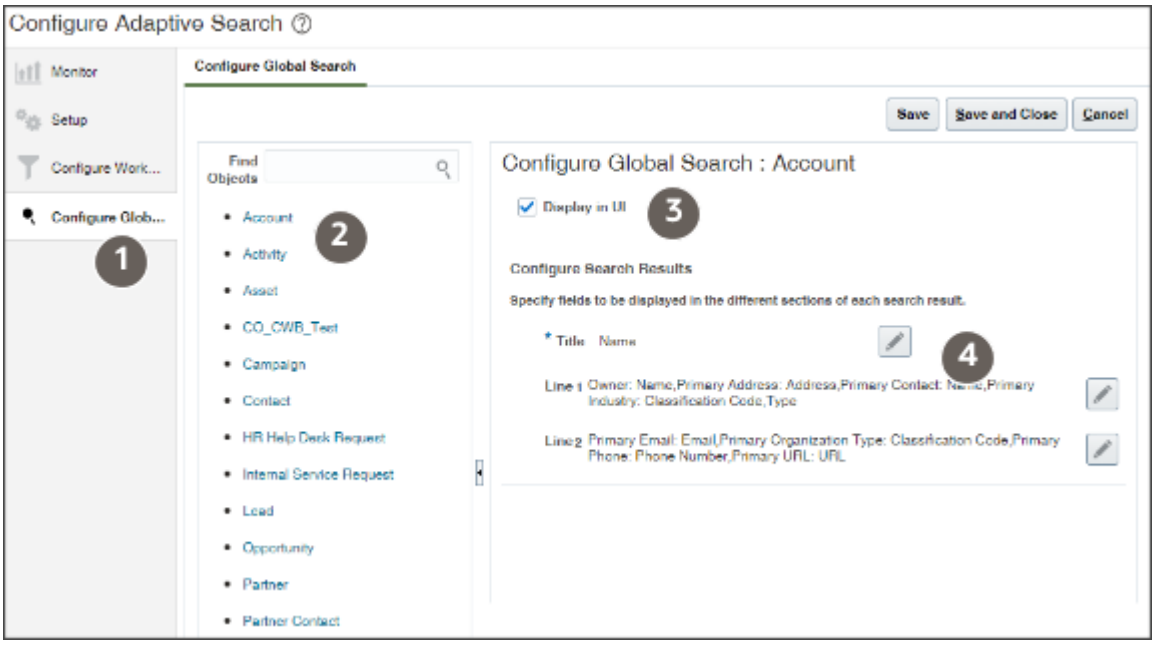
- A title that provides the link that users click to drill down into the record. By default, the name of the record is the title, but you can choose a different field.
- Two lines displaying fields you specify

Here is a screenshot showing the results of an account search:



1. In the Setup and Maintenance work area, open the **Configure Adaptive Search** task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Show: All Tasks
    - Task: Configure Adaptive Search

2. In the Configure Adaptive Search page, click the **Configure Global Search** tab in the left-side of the page (callout 1 in the screenshot).



1. Configure each object you enabled for Adaptive Search:
    a. Click the object link in the **Objects** column on the left (callout 2).
    b. You can prevent users from using Global Search to search the object by deselecting the **Display in UI** option (callout 3). By default, users can search all objects you enabled for Adaptive Search.
    c. By default, users click on the record name link in the search results to drill into a record, but you can select a different field. To change the drill-down link, click **Title** (the pencil icon, callout 4) and select the alternate field.
    d. Click the **Line 1** edit button and select the fields you want to display in the first line under the title.
    e. Click the **Line 2** edit button and select the fields you want to display in the second line.
    f. Click **Save**.
2. When you complete configuring all the objects, click **Save and Close**.

Configure Global Search UIs

Optionally, you can configure the behavior of global search UIs. For example, you can specify which suggestions display automatically when users click in the search field and which objects display in search results. You can create different configurations for different application pages.

> **Tip:** If you already made a copy of the new OSC Default Global Search Configuration, then you can edit that copy and make your changes there. You don't need to create a second copy.

Duplicate the Default Configuration Provided by Oracle

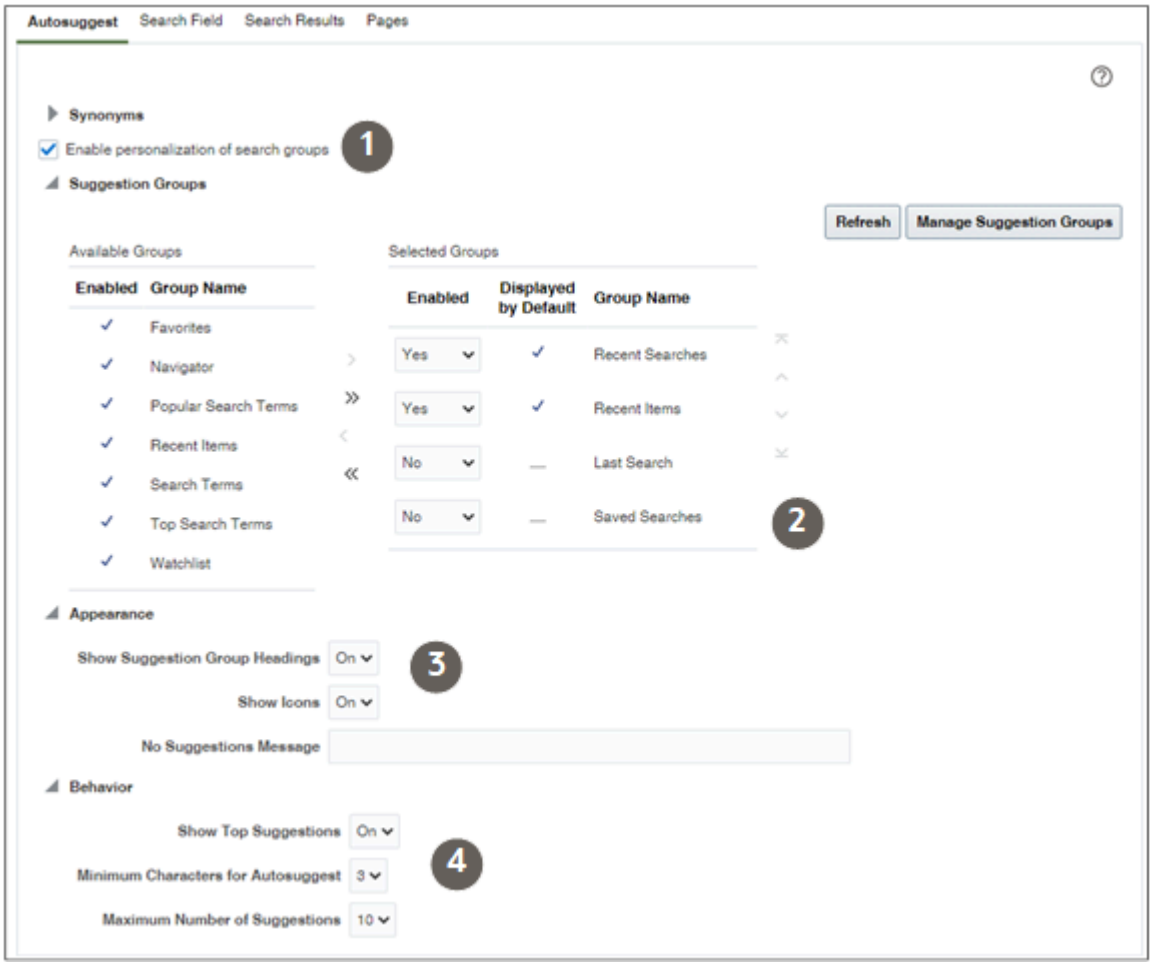
You can't make changes to the Global Search configuration provided by Oracle. You must copy the Oracle configuration and edit that copy instead. If you already created a copy, you can skip this step.

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance**.

2. In the Setup and Maintenance work area, open the **Manage Global Search Configurations** task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Show: All Tasks
    - Task: Manage Global Search Configurations
3. On the Manage Global Search Configurations page, select the configuration with the **OSC** short name and **Default Global Search Configuration** name.
4. Click **Duplicate** (the document icon).
5. In the **Short Name** field, enter an alphanumeric code with uppercase letters and no spaces.
6. Enter a name for your configuration in **Display Name**.
7. Select CRM as the product family and module.
8. Leave the **Default** option deselected for now. You select this option as a last step.
9. Click **Save and Close**.
10. Open the Manage Global Search Configurations page again.
11. Click the name link for the configuration you created.
12. Use the tabs to define your configuration:
    - **Autosuggest:** Determine what's available to users in the global search autosuggest, as well as how autosuggest looks and behaves.
    - **Search Field:** Control the **Search** field in the global header and in the search results dialog box.
    - **Search Results:** Specify if salespeople can personalize the filters used in their searches
    - **Pages:** Specify where you want your configuration to apply.

Define Which Groups of Suggestions Users See

1. While editing the global search configuration you created, click the Autosuggest tab.



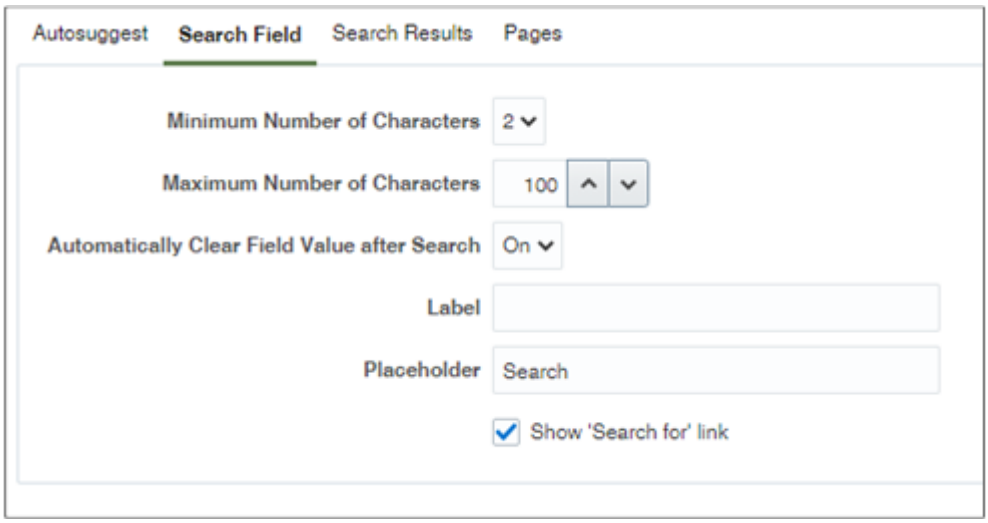
2. Skip setup of **Synonyms** as they don't apply to Sales.
3. Keep the **Enable personalization of search groups** option selected unless you want to prevent users from personalizing suggestion groups.
4. In the **Suggestion Groups** section:
    - Move the **Saved Searches** group (callout 2), and any other unwanted suggestion groups, to the **Available Groups** column. This action removes them from use. Saved searches can't be used with Global Search.
    - You can remove a suggestion group from being displayed by default by setting **Enable** to **No**. Users can still enable the group when they personalized their global search.
    - You can change the order the suggestion groups are presented to users.
    - You can change the suggestion group headings.
        i. Click **Manage Suggestion Groups**.
        ii. Duplicate an existing group and edit your copy.
        iii. Click **Refresh**.
        iv. Swap your copy for the original.
5. You can turn the suggestion group headings off in the Appearance section (callout 3).

6. You can change suggestion behavior (callout 4):
    - **Show Top Suggestions:** Enable this option to display suggestions in autosuggest as soon as the user clicks in the search field, even without entering a search term. For example, the last few pages the user opened would appear as suggestions in the Recent Items group.
    - **Minimum Characters for Autosuggest:** Enter the number of characters that users must enter in the search field before matching suggestions appear in autosuggest.
    - **Maximum Number of Suggestions:** Enter the maximum number of suggestions to be displayed across all suggestion groups. This total is distributed as equally as possible among the groups.

Configure the Global Search Field

Here are the main configurations for the global search box field:

- You can change the minimum and maximum number of characters required for search.
- You can specify a different word to appear in the Global Search box instead of "Search".



Configure How Salespeople Can Use Filters

- In the **Saved Search and Recent Search** section, you can disable the display of recent searches by deselecting **Enable recent searches**. Saved searches aren't available in global search.
- In the **Filters** section:
    - Keep **Enable personalization of search categories** selected unless you want to prevent users from specifying which objects they see in the search results. You determine the objects that show up as filters in global search while setting up Adaptive Search (see the topic Configure Global Search Scope and Display of Search Results).
    - **Enable clear all filters:** Allow users to clear all filters by clicking the **Clear All Filters** button in search results.
    - **Show applied filters:** Show all the filters that have been applied
- The **Search Categories** section and the rest of the sections on this tab don't apply to Classic Sales.

Specify the Sales Pages Where Your Configuration Applies and Complete the Configuration

Entering the application pages is a one-time setup. If you're editing a configuration you created, then you don't need to reenter the page codes again. You can skip this step.

1. Enter codes (view IDs) for the applications or pages where you want your configuration to apply. Here are the entries for Classic Sales:

View Type	View ID
Application	CRMPerformanceApp%
Application	ORA_CRM_SERVICESAPP%
Application	ORA_CRM_UIAPP%
Application	ORA_SERVICEAPP%
Application	SalesApp%
Application	ORA_FSCM_UIAPP%

   You can obtain other codes in Setup and Maintenance, using the Manage Taxonomy Hierarchy task as described the linked topic: Specify the Pages or Applications That a Global Search Configuration Applies To.
2. At the top of the page, select the **Default** option.
3. Click **Save and Close**.
4. Clear your browser cache and navigate to any of the sales pages to test your configuration.

6 Saved Searches

Saved Searches in Sales for Redwood and Classic Sales

This chapter outlines how you create saved searches for different roles in the sales organization. You can create, share, and manage the saved searches in two separate UIs: one in Sales for Redwood and the other in Classic Sales. Which UI you use doesn't matter. The result is the same.

Salespeople can use the saved searches in any of the UIs that use Adaptive Search. In Sales for Redwood, this includes all list pages and some lists of values (smart pickers). In Classic Sales, this includes Workspace and the work areas powered by Adaptive Search. The saved searches you create are also available in CX Sales Mobile.

> **Note:** This guide explains how to create saved searches for UIs that use Adaptive Search. For an explanation of how to create saved searches for the legacy work areas that still use CRM Search, see the topic *Overview of Work Area Search Setup* in the Implementation Reference guide.

Overview of Saved Search Setup

Here's an overview of how you can create saved searches for different roles in your organization.

Step	Description	Navigation	Where to Get More Details
1	If you haven't already, review the list of fields available in Adaptive Search and make changes before you create saved searches.	N/A	*Adaptive Search Configuration Provided by Oracle*
2	Create saved searches for different job roles in the sales organization.	On any list page	*Create Saved Searches for the Sales Organization*

Saved Searches in Sales for Redwood

Saved Searches Targeted at Different Users

As a sales administrator, you can configure saved searches targeted to different job roles in the sales organization.

> **Note:** The saved searches you create in Sales for Redwood are identical to those you create in other work areas powered by Adaptive Search. You can create, delete, and otherwise manage searches in either application, and the saved searches are available to users of both applications.

Configuring the saved searches for each work area involves two steps:

1. Create the saved searches in the landing page for each sales object. When you name your searches, keep in mind that users see them listed in alphabetic order.
2. Use the Manage Saved Searches page to share your saved searches with everyone or with the appropriate job roles. You can configure different lists of saved searches for different job roles, specify the search that runs by default when users open the work area, and you can hide the saved searches provided by Oracle.

While you can configure saved searches for the sales organization, every user can personalize the list of saved searches in each work area for their own use. They can save their current search criteria and their preferred way of displaying search results as a new saved search. Every user can specify which saved search runs by default whenever they open that particular work area. Users can also hide any saved searches they don't want to see.

Review What Searches Are Available for a Sales Object

Here's how to review saved searches available for a particular sales object.

1. Navigate to the appropriate work area landing page. Each business object has its own list of saved searches.
2. Click in the search field and select **Manage Saved Searches** .
3. From the Manage Saved Searches page, **Visible To** list, select **Me**. The Me list includes saved searches you created and haven't shared, the saved searches visible to everyone, and all of the saved searches visible to the job roles assigned to you. Saved searches provided by Oracle are shared with everyone and list Oracle as the owner.
4. Different job roles may have saved searches available to them that won't appear on your **Me** list. To ensure you see all of the saved searches, cycle through all the job roles in the **Visible To** list.

Create Saved Searches for the Sales Organization

Creating a saved search that you can share with the sales organization is as simple as clicking the save button on the landing page.

The new saved search includes not only your current search criteria and keywords, but also your preferred way of displaying and sorting the results. Here are the details:

1. Click **Actions** > **Save** on the list page.
2. In the dialog box, enter the name for your saved search.
3. Click **Save**.

   Your new saved search is now listed in the Manage Saved Searches page. You're now ready to share the saved search with the sales organization. For details, see the topic *How do I share a saved search with everyone or with specific job roles?*.

Manage Saved Searches Page

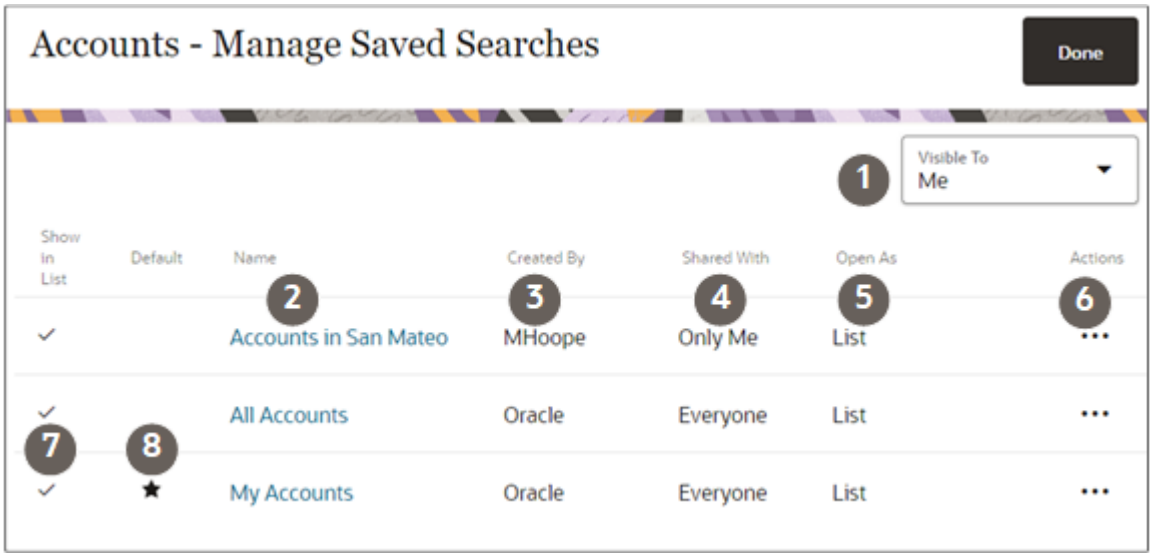
As a sales administrator, you can use the Manage Saved Searches page to specify saved searches for others in the sales organization. You can also use the page to maintain your own list as does any other user, as described in the Using Sales for Redwood guide.

Here's what you can do on the Manage Saved Searches page:

- Share saved searches you created.
- Remove from use any saved searches provided by Oracle that you don't need. You can't delete the saved searches Oracle provides, but you can unshare them.
- Specify which saved search appears by default when users navigate to the work area.
- Delete any saved searches you created.
- Create different lists of saved searches for different job roles.
- For contacts and leads, you can choose to display the first record in the list rather than the list itself.

Here's an annotated screenshot to give you an overview:

Callout Number	Column	Explanation
1	Visible To	Access the different lists of saved searches for different job roles. Each role can have its own configuration.
2	Name	Clicking on the name of the saved search displays the search results.
3	Created By	You can only delete saved searches created by your organization. You can't delete saved searches created by Oracle, but you can unshare them so they're visible only to you.
4	Shared With	Saved searches you create are personal (Shared With Only Me) unless you share them.
5	Open As	**List**: The saved search displays results as a list. For lead and contact saved searches only, you can instead open the first record in the list (**Detail**).
6	Actions	The **Actions** menu (three dots) displays the available actions for each saved search.
7	Show in List	Indicates if the saved search is visible or hidden from you when you put your cursor in the search field on the landing page.
8	Default	For each list of saved searches, you can specify a different saved search to run by default when users open the landing page. Users can always specify their own default.



How do I share a saved search with everyone or with specific job roles?

You can configure the saved search setup to specify the saved search that appears by default whenever a user opens the work area. You can also setup saved searches to share with everyone or to share with each specific job role.

After you create a saved search, it's initially visible only to you. Here's how to share it with the whole sales organization or with individual job roles.

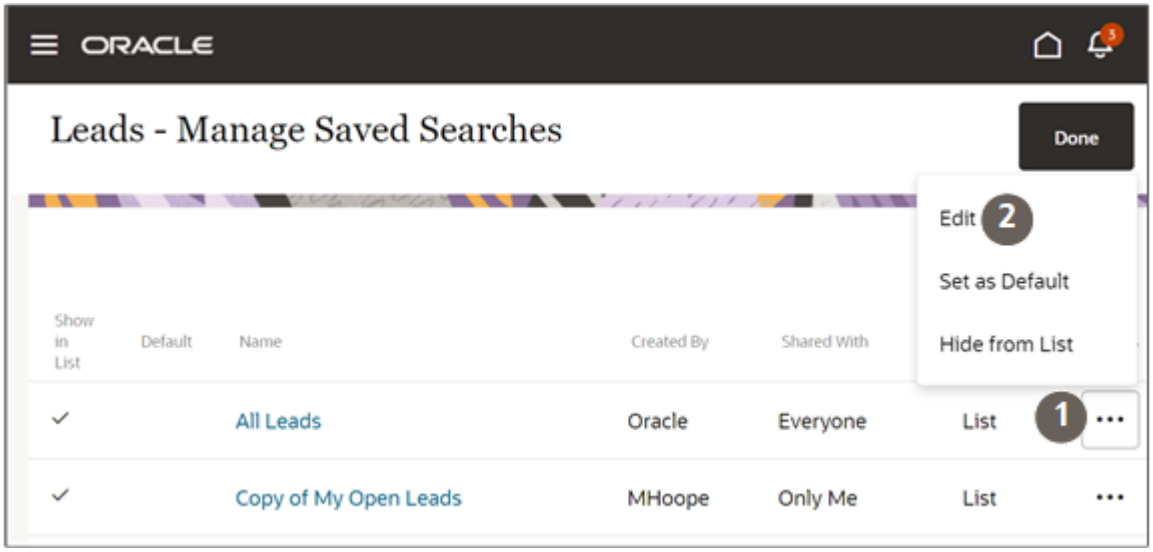
1. Navigate to the work area.
2. Click in the search field and select **Manage Saved Searches**.
3. From the **Visible To** list, select **Me**.
4. Click **Actions** (the three dots in the Actions column) for the saved search you want to share and select **Edit**.
5. Make a selection from the **Shared With** list:
    - If you're making the saved search available to the whole sales organization, select **Everyone**.
    - If you're making it available for specific roles, here's how to add them:
        i. Select **Specific Roles**.
        ii. Click **Add**.
        iii. Select the role.
        iv. Click **Save** (the check mark icon).
6. Click **Save**.

If you shared the saved search with job roles that aren't assigned to you, then the saved search is no longer visible on your page. To see it, select one of the job roles assigned to it from the **Visible To** list.

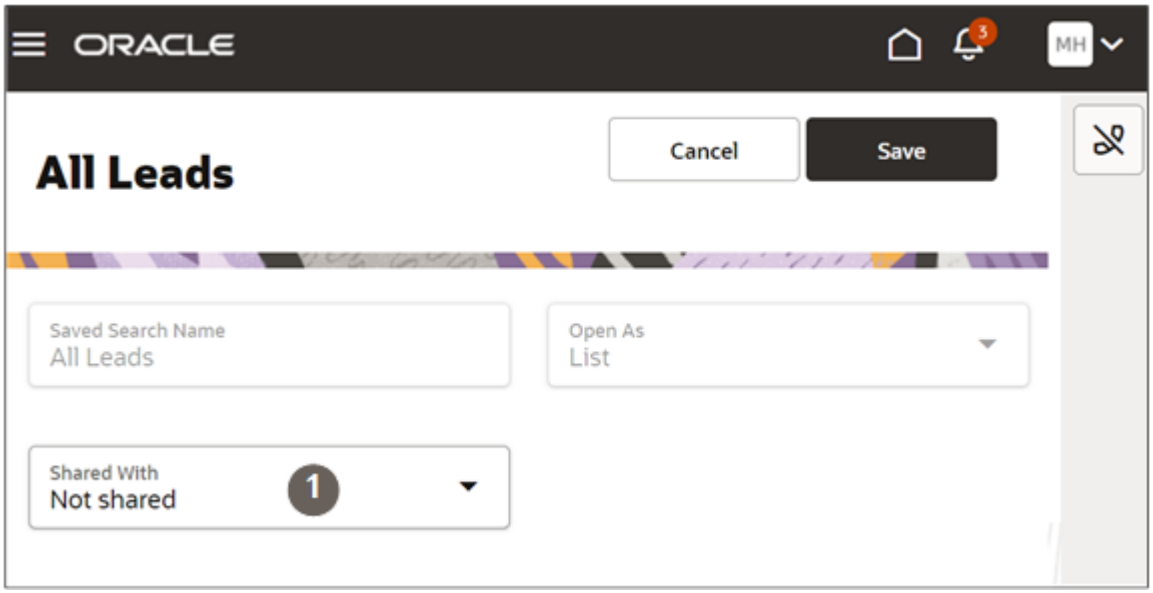
Remove a Saved Search from Use by Unsharing It

As an administrator, you can remove saved searches from use entirely by unsharing them. Doing so removes them from the lists of saved searches for all users except yourself. Use this method to remove from use any saved searches provided by Oracle that you don't need.

1. Place your cursor in the search field on the landing page and select **Manage Saved Searches**.
2. On the Manage Saved Searches page, click **Actions** (the three dots) for the saved search you want to remove, and select **Edit**.



3. On the edit page, click **Shared With** and select **Not shared** (callout 1 in the screenshot).



4. Click **Save**.

The saved search is now visible only to you. It's removed from use for the entire organization.

Specify Which Saved Search Appears for Users by Default

For each business object, you can specify the saved search that appears by default whenever a user opens the work area. You can specify different defaults for each job role.

1. Navigate to the work area.
2. Click in the search field and select **Manage Save Searches**.
3. From the **Visible To** list, select the job role where you want to define the default.
4. Click **Actions** (the three dots in the Actions column) for the saved search and select **Set as Default**.

Rename a Saved Search

You can rename saved searches you created. Saved searches are listed in alphabetic order for users when they put their cursor in the search field.

1. Navigate to the work area.
2. Click in the search field and select **Manage Saved Searches**.
3. From the **Visible To** list, select **Me** to see the lists that you shared with everyone and those you haven't shared yet. If you shared the list with a specific job role, and that job role isn't assigned to you, then you must select that job role to see the saved search that you want to rename.
4. Click **Actions** (the three dots in the Actions column) and select **Edit**.
5. Enter a new name.
6. Click **Save**.

Delete a Saved Search You Created

You can delete saved searches you and other administrators created. Your action deletes the saved search for every role where it is shared. You can't delete saved searches provided by Oracle, but you can hide them.

1. Navigate to the work area.
2. Click in the search field and select **Manage Saved Searches**.
3. From the **Visible To** list, select **Me** to see the lists that you shared with everyone and those you haven't shared yet. If you shared the list with a specific job role, and that job role isn't assigned to you, then you must select that job role from the list to see the saved search you want to delete.
4. Click **Actions** (the three dots in the Actions column) and select **Delete**.
5. Click **Save**.

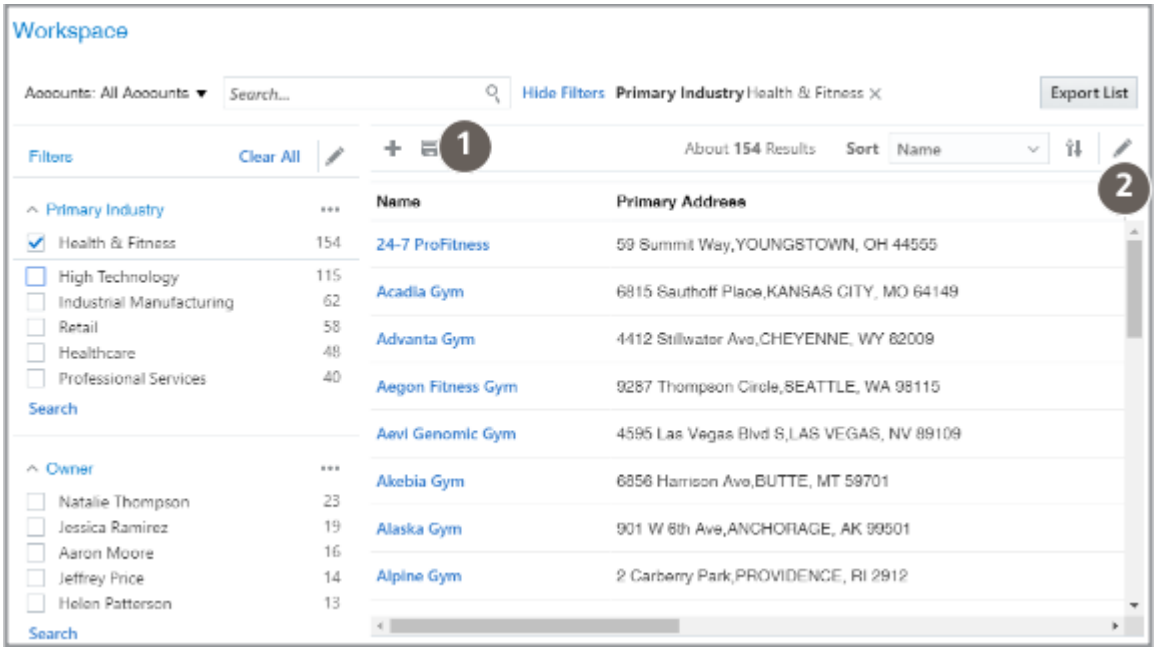
Saved Searches in Classic Sales

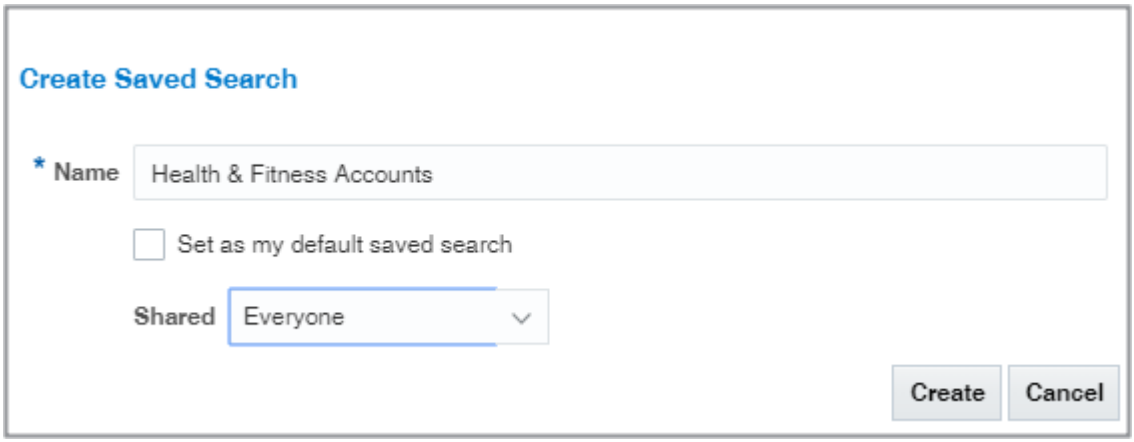
Create Saved Searches

Here's how you can create saved searches in the Classic Sales UI either for yourself or for others in the organization. The saved searches you create are the same ones you create in Sales for Redwood. You're just creating them in a different UI.

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

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





5. Enter the name for your saved search. Remember that the saved searches are listed in alphabetic order.
6. To make this saved search the default saved search for you personally, select the **Set as my default saved search** option. The default saved search is what you see whenever you navigate to Workspace.
7. Specify how you want to share the saved search you're creating. There are three options:
    - Only Me
    - Everyone
    - Specific Roles
8. If you selected **Specific Roles**, click **Search** (the people icon) and select the job roles.
9. Click **Create**.

Overview of the Manage Saved Searches Page

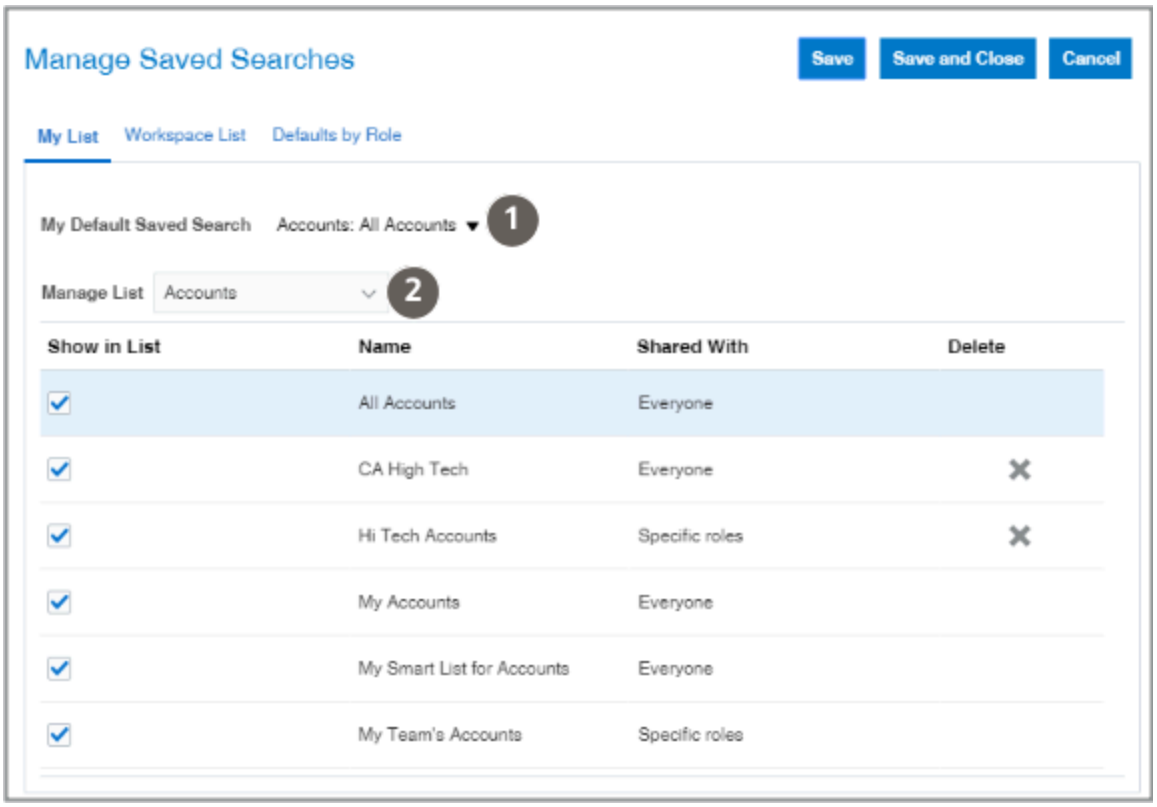
Use the Manage Saved Searches page to manage your own list of saved searches, manage the lists sales users see, and to specify the default saved search different roles see when they open Workspace.

My List

On the **My List** tab, you can manage your own personal lists of saved searches (there's a separate list for each business object).

- You can specify which saved search displays when you navigate to Workspace by making a selection from **My Default Saved Search** (callout 1 in the screenshot).
- To view the saved searches for a specific business object, just make a selection from **Manage List** (Callout 2 in the screenshot).
- You can hide individual saved searches by deselecting **Show in List**.
- You can delete only saved searches that you created.

  While you can't delete saved searches provided by Oracle, you can hide them.



Workspace List

On the **Workspace List** tab, you can share saved searches with everyone, with specific user roles, or with no one.

For each business object that you select from Manage List (callout 1 in the following screenshot), you can:

- Specify who can view each saved search by specifying a value in the **Shared With** column (callout 2 in the screenshot).
    - For saved searches provided by Oracle, you can either share the saved search with everyone or not share it at all, effectively hiding it from use.
    - For saved searches created by you or other administrators, you can select one of the following:
        - Only Me

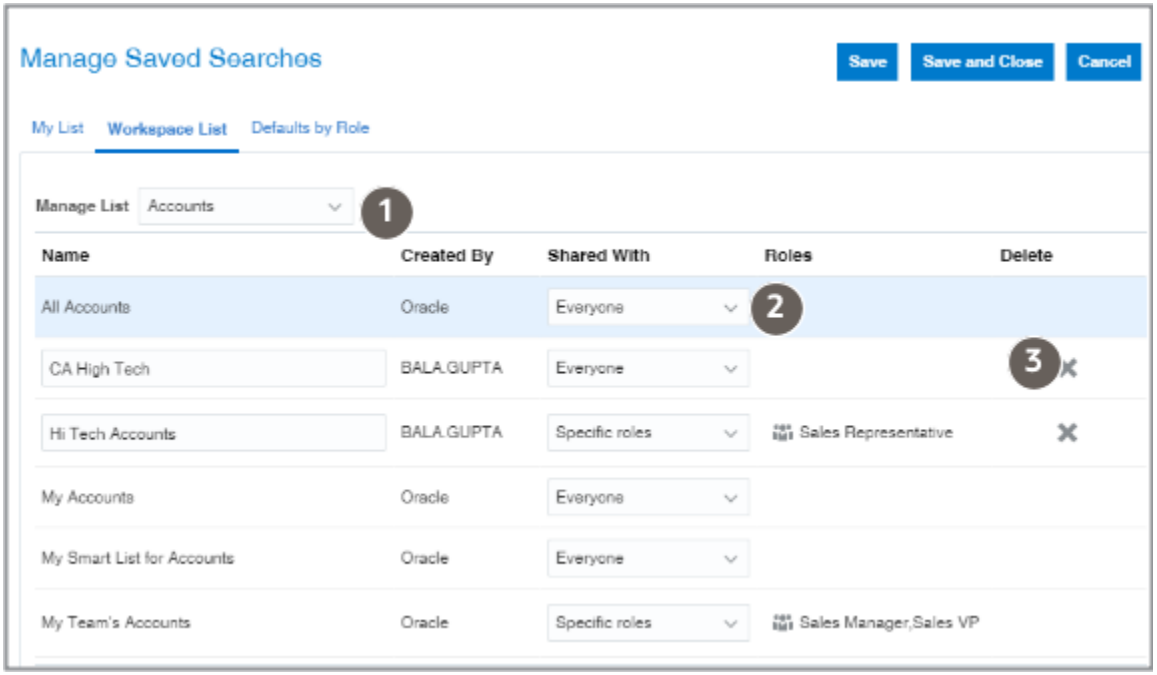
          Makes the saved search a personal saved search that you can manage on the My List tab.
        - Everyone

          Makes the search available to all roles.
        - Specific Roles

          Makes it possible for you to specify one or more specific job roles that can see the saved search.
        - Not Shared

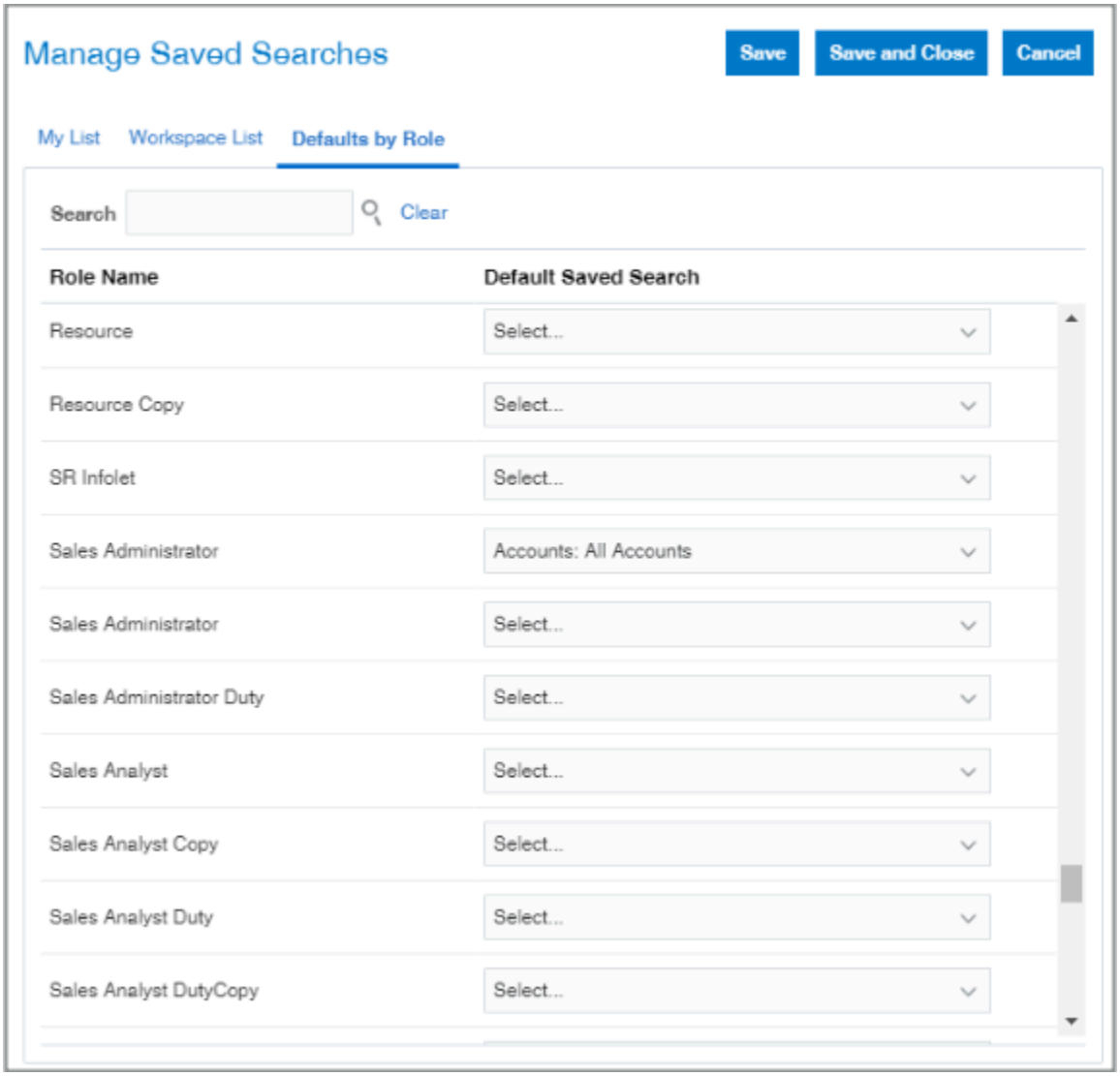
          Removes the search from use.
- You can delete only saved searches that you created (callout 3 in the screenshot).

  While you can't delete saved searches provided by Oracle, you can remove it from use by selecting the **Not Shared** value in the **Shared With** column.



Defaults by Role

Use the **Defaults by Role** tab to define the default saved search for each job role. This is the saved search that users with the job role see when they open Workspace.



Specify the List of Saved Searches for Different Job Roles

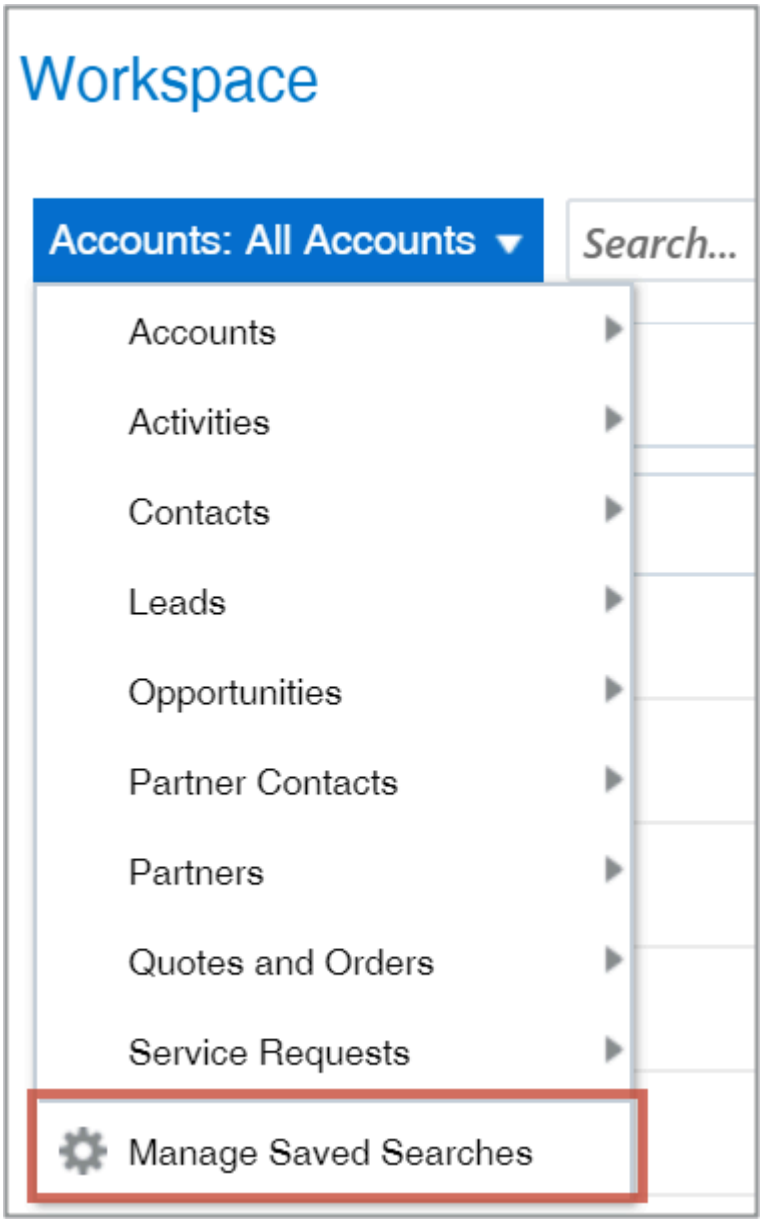
Specify the lists of saved searches that are available for each business object in Workspace. You can create different lists for different job roles. The saved searches appear in ascending alphabetic order in the list.

The same saved searches show up as filters in actionable infolets. For example, because All Accounts starts with the letter A, users see All Accounts when they view the My Accounts actionable infolet, unless you create a different saved search to appear on top. To display the most critical sales information for sales users by default, remove the All Account saved search from the list by hiding it and replace it with a more appropriate saved search. If need be, you can recreate saved searches and rename them to get the order you want.

Here's how to configure the list:

1. In Workspace, click the drop-down list you use to select the object and saved search.

2. Select **Manage Saved Searches** (highlighted in the screenshot).



3. Click **Workspace List**.
4. Select the business object in **Manage List** (callout 1 in the following screenshot)

5. Specify who sees which saved searches for each object. Here's how:
    - For each saved search, specify who can see it by making a selection in the **Shared With** column (callout 2 in the screenshot).
        - For saved searches provided by Oracle, you can either share the saved search with everyone or not share it at all, effectively hiding it from use.
        - For saved searches created by you or other administrators, you can select one of the following:
            - Only Me

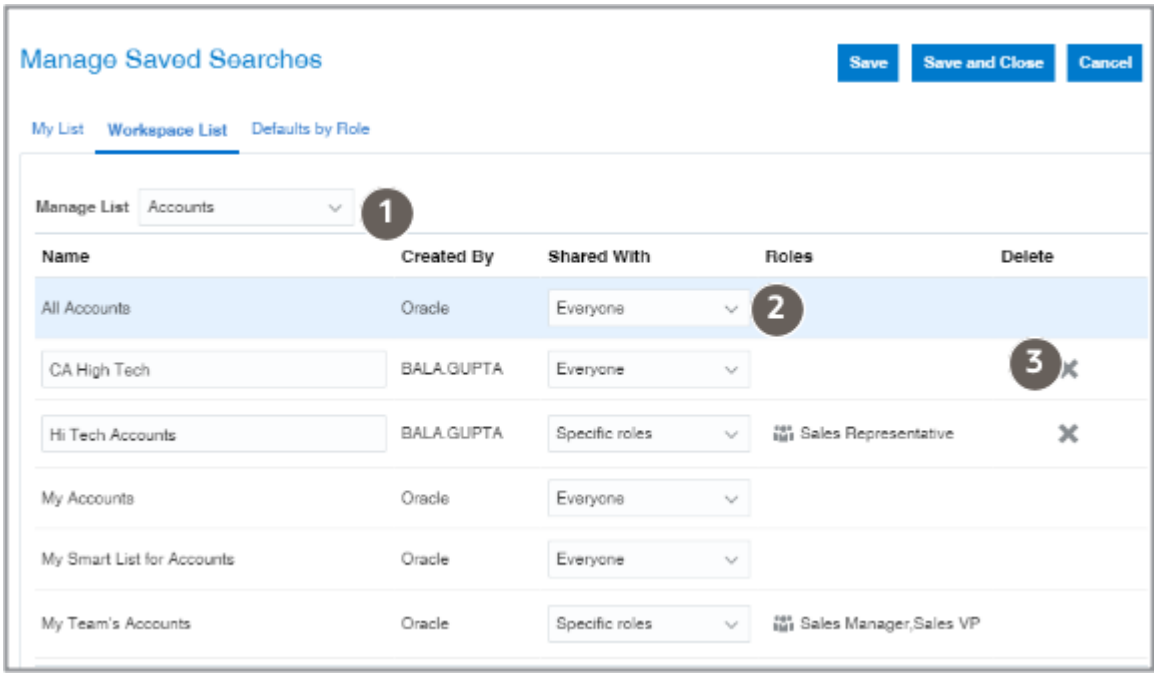
              Makes the saved search a personal saved search that you can manage on the My List tab.
            - Everyone

              Makes the search available to all roles.
            - Specific Roles

              Makes it possible for you to specify one or more specific job roles that can see the saved search.
            - Not Shared

              Removes the search from use.
    - You can delete only saved searches that you created (callout 3 in the screenshot).

      While you can't delete saved searches provided by Oracle, you can remove it from use by selecting the **Not Shared** value in the **Shared With** column.



6. To specify the default saved search users see when they open Workspace, click **Defaults by Role** and select the default saved search for each role.
7. Click **Save and Close**.

Specify What Users See When They Open Workspace

For each job role, you can specify which business object and saved search they see when they open Workspace or a work area for an object.

1. In Workspace, click the drop-down list you use to select objects and saved searches.
2. Select **Manage Saved Searches**.
3. In the Manage Saved Searches page, click **Defaults by Role**.
4. Select the default saved search for each role
5. Click **Save and Close**.

7 Accounts and Contacts

Account and Contact Basics

Some basic terminology first. Your sales application is set up for business-to-business sales, so accounts are the organizations you sell to. The account Type field indicates if an account is a prospect or a customer. You can create contacts for a specific account or you can create standalone contacts.

Accounts in the Classic Sales UI

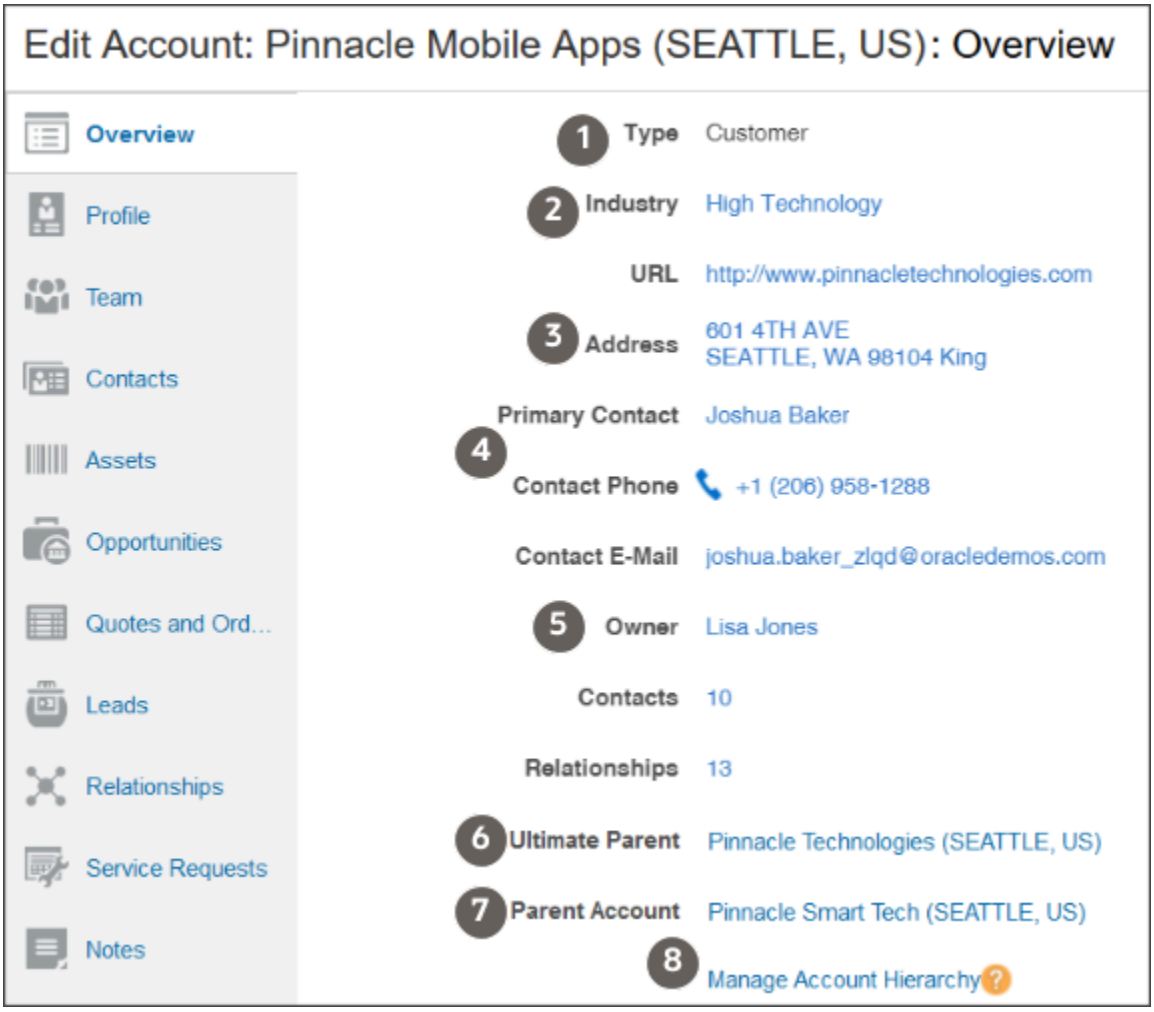
You can track lots of information for accounts in the various tabs, but most of the information comes from other business objects. For account-specific information, you use the Overview and Profile tabs. Here's what you can tell about the sample account in the screenshot just by looking at the Overview tab:

- You know that this account is an existing customer because the account Type field (callout 1) is set to Customer.
- The Industry field displays the primary industry for this customer (callout 2).

  You can add multiple industries for each account, but, if you're assigning accounts by industry, then the account gets assigned using the primary industry.

  > **Tip:** If you're planning to assign accounts by industry, you may want to make entry in the Industry field required when salespeople create accounts. While you can use Application Composer to make most fields required, Industry isn't one of them. For Industry, you must use a combination of Page Composer and some Groovy scripting. See these Oracle Support documents: 2261254.1 and 2193779.1.

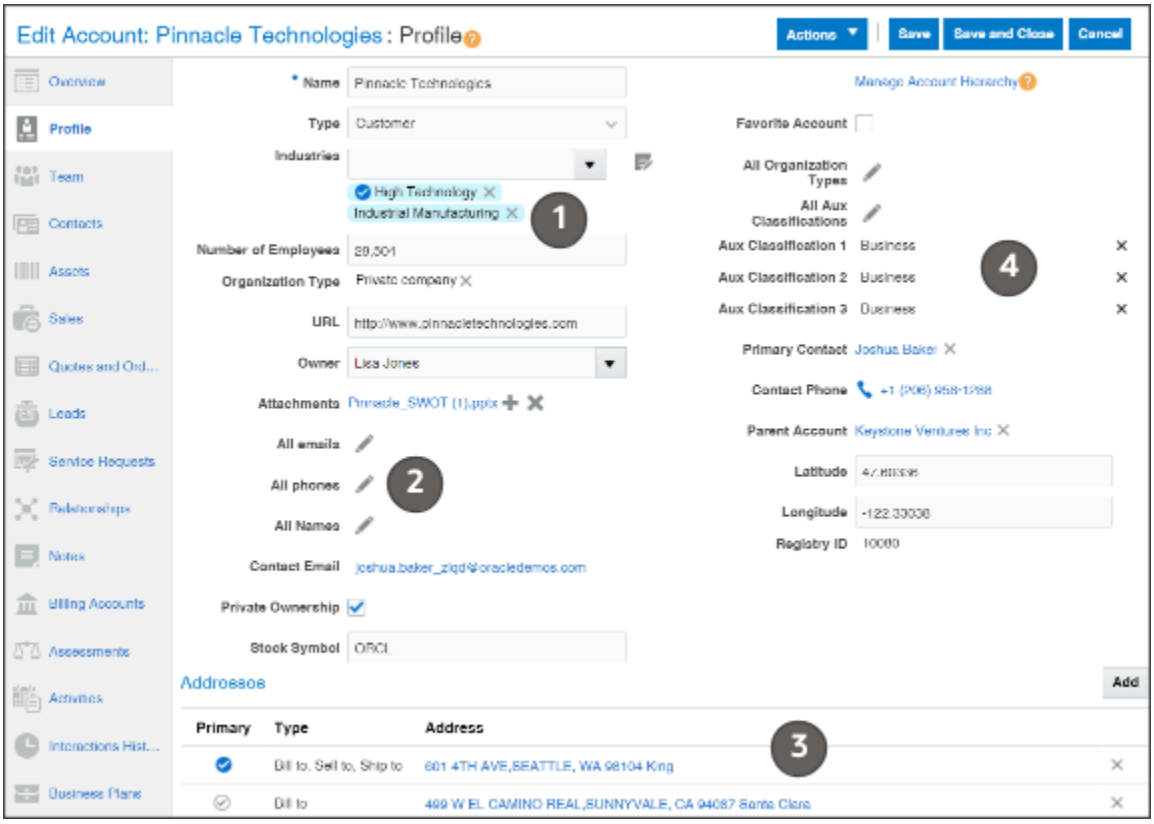
- The tab displays the primary address (callout 3) and information about the primary contact (callout 4).
- The account owner (callout 5) is usually the person who created the account, but can be reassigned.
- If you're tracking account relationships, clicking the **Ultimate Parent** field (callout 6) gets you to the top of the account hierarchy. You must expose this field during setup.
- The Parent Account (callout 7) just gets you to the immediate parent account.
- You can view and edit the whole account hierarchy by clicking **Manage Account Hierarchy** (callout 8).



On the Edit Account, Profile tab, salespeople can add additional industry classifications for the account (callout 1 in the following screenshot). Without further setup, sales territory assignment uses only the primary industry, indicated by the check mark icon.

There are multiple ways that you can configure the Profile tab. For example, you can:

- Capture multiple emails, phones, and names and tack customer and contact preferences (callout 2).
- Capture multiple addresses. Only the primary address is used for opportunity assignment (callout 3)
- Display additional fields, including your own classifications that you can use for opportunity assignment (callout 4).



Accounts in the Sales for Redwood UI

Accounts in the Sales for Redwood UI are very different. Gone are the tabs and much of the detail on the overview page. Records are divided into three sections:

- Summary (callout 1 in the screenshot)

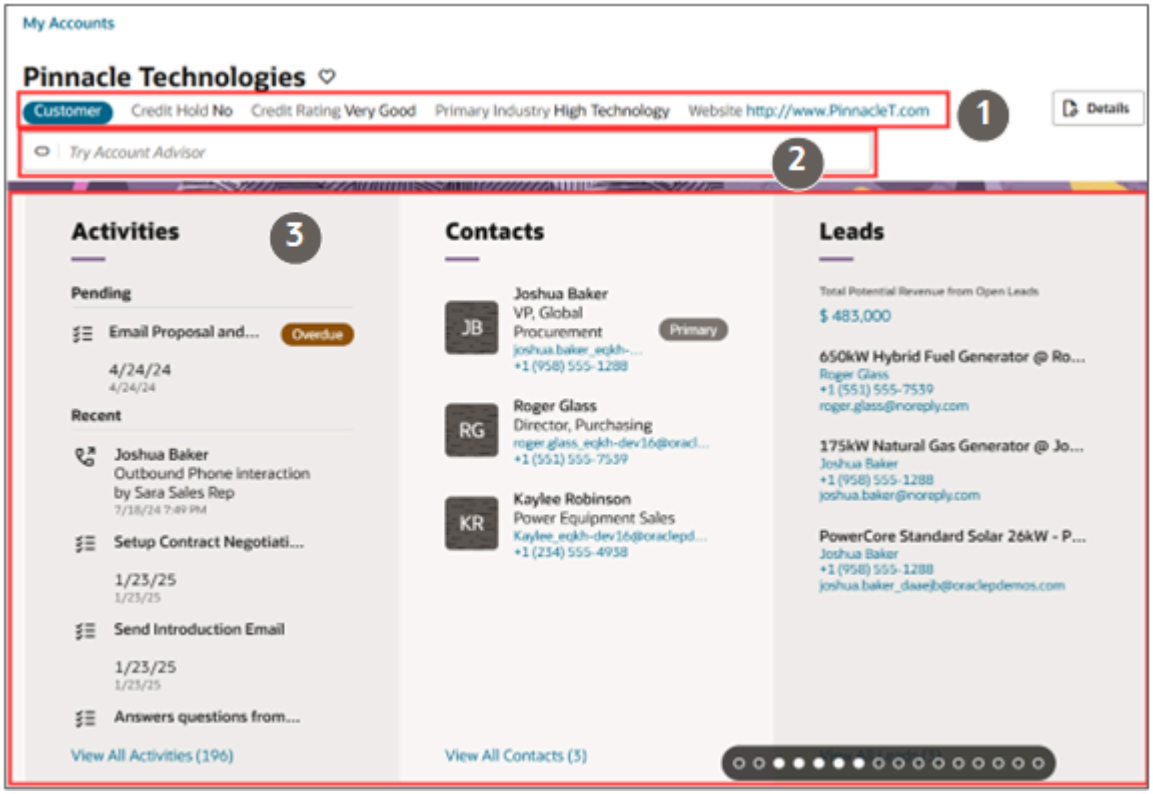
  Lists the primary information about the account and contact.

- Ask Oracle bar (callout 2)

  Instead of clicking on tabs as you do in Classic Sales, you enter commands to view and enter detailed information about the account.

- Panels with key information (callout 3)

  Key related information about the account is displayed in panels and linked pages. You access other information using the Ask Oracle bar.



For more information about the way Sales for Redwood has transformed the UI layout and functionality see the topic *Anatomy of a Record*.

Industry Classification Category Types for Accounts

You can specify which industry classification category you want to use for your accounts. By default, the application uses the CUSTOMER_CATEGORY classifications created by Oracle. The other classification available categories include:

- 1972 SIC
- 1977 SIC
- 1987 SIC
- CUSTOMER_CATEGORY
- NACE
- NAF
- NAICS_1997
- NAICS_2002

You can add other classification categories, such as NAICS 2012 and NAICS 2017, to this list as described in the topic: Add to the List of Available Industry Classification Categories.

If you plan to enrich your account records with Dun & Bradstreet Corporation data available from Oracle Data as a Service (DaaS), then you must either select the 1987 SIC category or add another supported category, such as NAICS 2017, to the list.

Related Topics

- Add to the List of Available Industry Classification Categories
- Enable Address Usage Types for Accounts
- Enable Display of Multiple Addresses

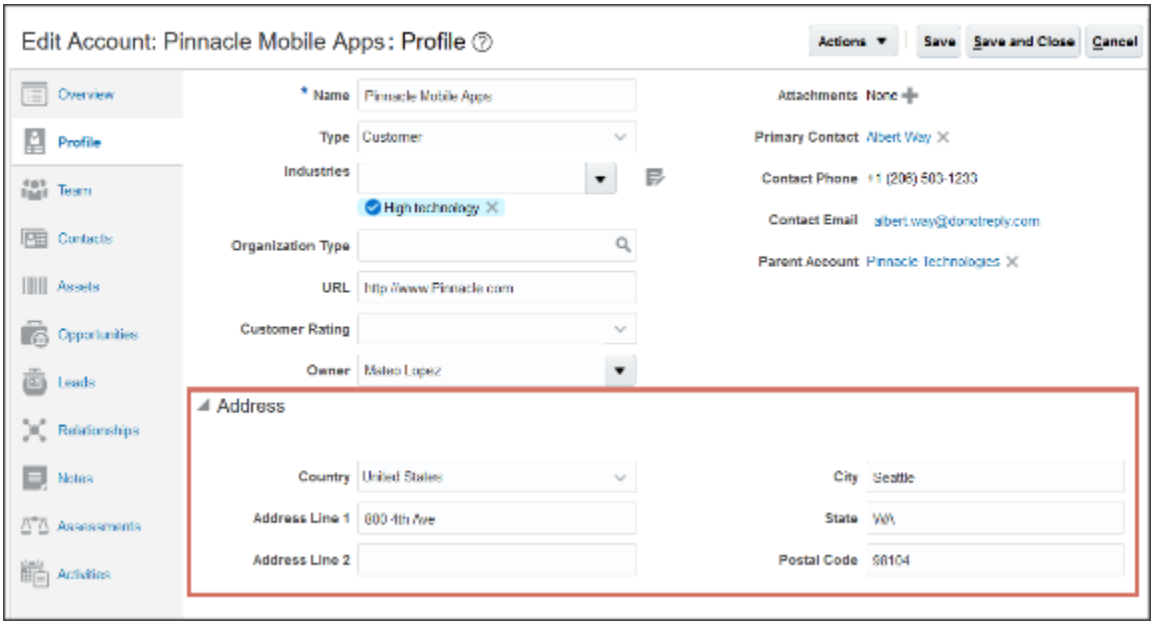
Account Addresses

As delivered, the Classic Sales accounts pages display a single primary address for each account. You can make it possible for salespeople to view and enter additional addresses by configuring the Profile tab on the Edit Account page. This setup isn't required for Sales for Redwood. Sales for Redwood accounts can store multiple addresses without any setup.

When you expose multiple addresses, salespeople can indicate the address type and they can designate any one of the addresses as the primary address. The application uses the primary address for assigning accounts, opportunities, and leads by address. The primary address is also the address that gets displayed automatically wherever addresses are listed.

Single Address

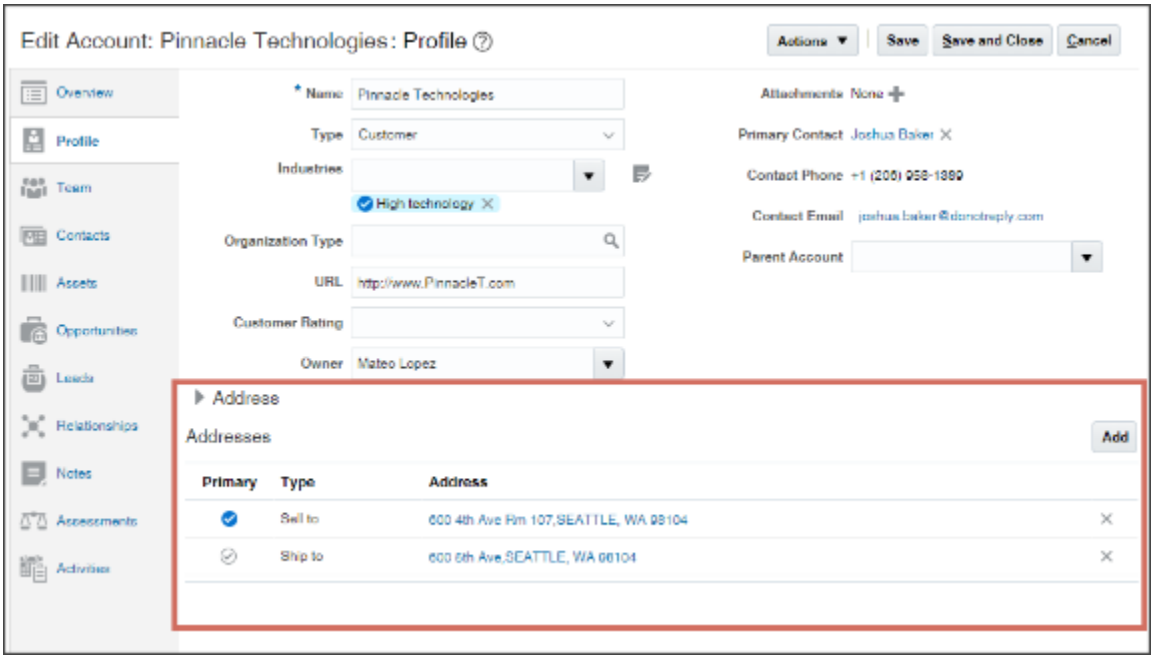
By default, the Profile tab of the Edit Account page displays the Address section with the primary address for the account. Here's a screenshot.



The single address UI doesn't display the address type, which is set as "Sell to" under the covers. You can set a different default type using the system profile option Default Address Type for Account.

Multiple Addresses

When you configure the Profile tab to display multiple addresses, salespeople see the Addresses section listing the multiple addresses. On the tab, you can select any address as primary or delete it. You drill down on an address to edit it or change its type. Here's a screenshot of the tab.



You add addresses by clicking **Add**. Here's a screenshot of the Add Address window.

You select one of the available address types from the **Type** list. An account can have multiple addresses of the same type. You must display the **Type** field in the window as part of your setup.

Overview of Account and Contact Setup

Here's an overview of the setups covered in this chapter:

Step	Applies To	Description	Navigation	Where to Get More Details

1	Both Sales for Redwood and Classic	Select the industry classification category you want to use to classify your accounts in the system profile option MOT_INDUSTRY_CLASS_CATEGORY.
		
		If the classification category you want to use isn't available in the system profile, you may be able to add it to the list of available categories using the task Manage Classification Groups.
		
		If you're planning to enrich your data with the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) service, you must use the 1987 SIC category unless you add additional classification categories supported by the service, such as NAICS 2017.
		
		Choose the classification carefully, especially if you're using the industry of an account for assignment and forecasting. Switching industry categories after you enable sales territories and import account data is complicated. You must load and activate sales territory dimensions again and reimport your account data with the new classification codes.
			• In Setup and Maintenance, go to the following:
			  ○ Offering: Sales
			  ○ Functional Area: Territories
			  ○ Show: All Tasks
			  ○ Manage Classification Groups
			• In Setup and Maintenance, go to the following:
			  ○ Offering: Sales
			  ○ Functional Area: Sales Foundation
			  ○ Manage Administrator Profile Values
				See the topics:
				• *Specify the Industry Classification Category for Accounts*
				• *Add to the List of Available Industry Classification Categories*

2	Both Sales for Redwood and Classic	Prevent salespeople from entering duplicate contacts and accounts in the UI by enabling automatic duplicate checking. There are just two setups required:
		• Enable the duplicate matching server.
		• Activate the duplicate matching configuration provided by Oracle.
			• In Setup and Maintenance, go to the following:
			  ○ Offering: Sales
			  ○ Functional Area: Sales Foundation
			  ○ Show: All Tasks
			  ○ Manage Server Configurations
			  Manage Enterprise Data Quality Matching Configurations
				See the topic: *How do I enable duplicate checking in Sales?*

Step	Applies To	Description	Navigation	Where to Get More Details
3	Classic Sales	As delivered, the accounts UI displays and enables the entry of one primary address for each account. If you need more than one address, you can use Application Composer to enable multiple addresses on the Edit Account page, Profile tab. Salespeople can view and enter additional addresses on this tab. Other accounts pages continue to display the primary address. When they add or edit addresses on the Profile tab, salespeople select an address type to indicate how the address is used. You must use the Application Composer tool to expose the Type field on the Add Address window.	**Navigator** > **Configuration** > **Sandboxes**	See the topic: *How can I enable multiple addresses for accounts?*
4	Classic Sales	You can make it possible for salespeople to go directly to the top account in the account hierarchy, by exposing the Ultimate Parent field in the Edit Account page Overview tab. You can make this Application Composer UI change in the same sandbox as the previous step.	**Navigator** > **Configuration** > **Sandboxes**	See the topic: *Display the Account at the Top of the Account Hierarchy in the Account Overview Tab*
5	Both Sales for Redwood and Classic	By default, the Type field lists three address types: • Bill to • Ship to • Sell to You can specify different and additional address types by editing the lookup type Party Site Use Code (PARTY_SITE_USE_CODE). This lookup type is shared with other Oracle Fusion applications. Only values tagged with SALES_CLOUD are available for use in the sales application.	In Setup and Maintenance, go to the following: • Offering: Sales • Functional Area: Sales Foundation • Show: All Tasks • Manage Standard Lookups	See the topic: *Manage Address Types*

Add to the List of Available Industry Classification Categories

Use these steps to add to the list of available industry classification categories. For example, if you want to use NAICS 2017 for your accounts, you can add it as described here.

1. In Setup and Maintenance, go to the following:
    - Offering: Sales
    - Functional Area: Accounts and Contacts
    - Task: Manage Classification Groups
2. Click **Search** without entering any search criteria.
3. Highlight the row for Industrial Categories in the search results.
4. Click **Edit** (the pencil icon).
5. On the Edit Classification Category Group: Industrial Categories page, click **Add Row** (the plus sign icon).
6. From the **Classification Category** list, select the classification category you want to add, for example, ORA_HZ_NAICS_2017.
7. Click **Save and Close**.
8. On the Manage Classification Category Groups page, click **Done**.

Specify the Industry Classification Category for Accounts

Specify the type of industry classifications you want to use for accounts.

1. Open the task **Manage Administrator Profile Values** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. In the Search: Profile Option region, **Profile Option Code** field, enter `MOT_INDUSTRY_CLASS_CATEGORY`.
3. Click **Search**.
4. If you don't see the classification category you need, try adding additional classification categories to this list as described in the topic: Add to the List of Available Industry Classification Categories.
5. Select the classification category from the **Profile Value** list.
6. Click **Save and Close**.

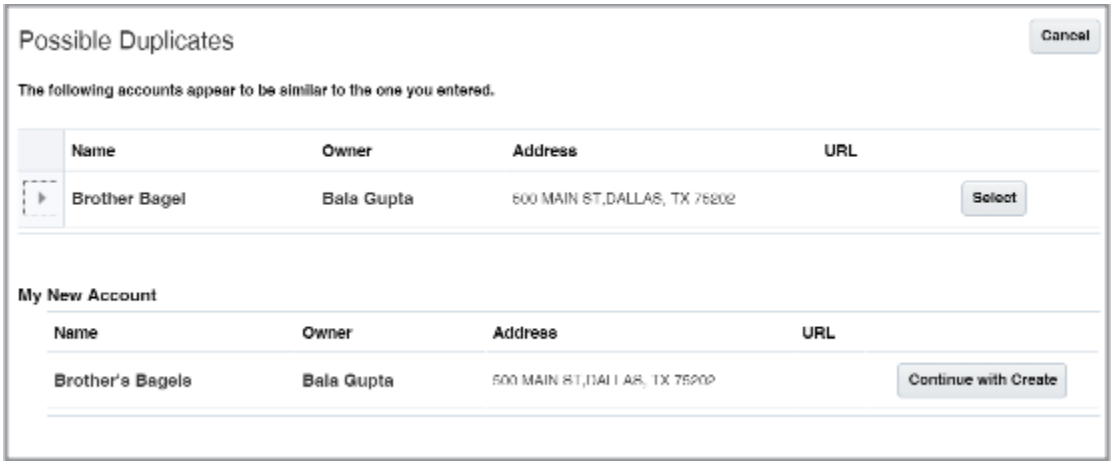
Related Topics

- Add to the List of Available Industry Classification Categories

How do I enable duplicate checking in Sales?

You can have the application automatically check for possible duplicates whenever a salesperson creates an account or a contact. If you're using Oracle Financials, the application checks for potential duplicates in financial accounts as well as sales accounts. Salespeople see the possible duplicates in a separate window and get to decide if they want to continue creating the new record or edit an existing one instead. If they select a financials record that doesn't yet exist in sales, the basic in formation from that record becomes available in Sales as well. Setup is simple: just enable the duplicate checking server, activate the built-in duplicate matching, set a couple of profile options, and you're ready to go.

Here's a screenshot of the window salespeople see when the try to create an account with possible duplicates.



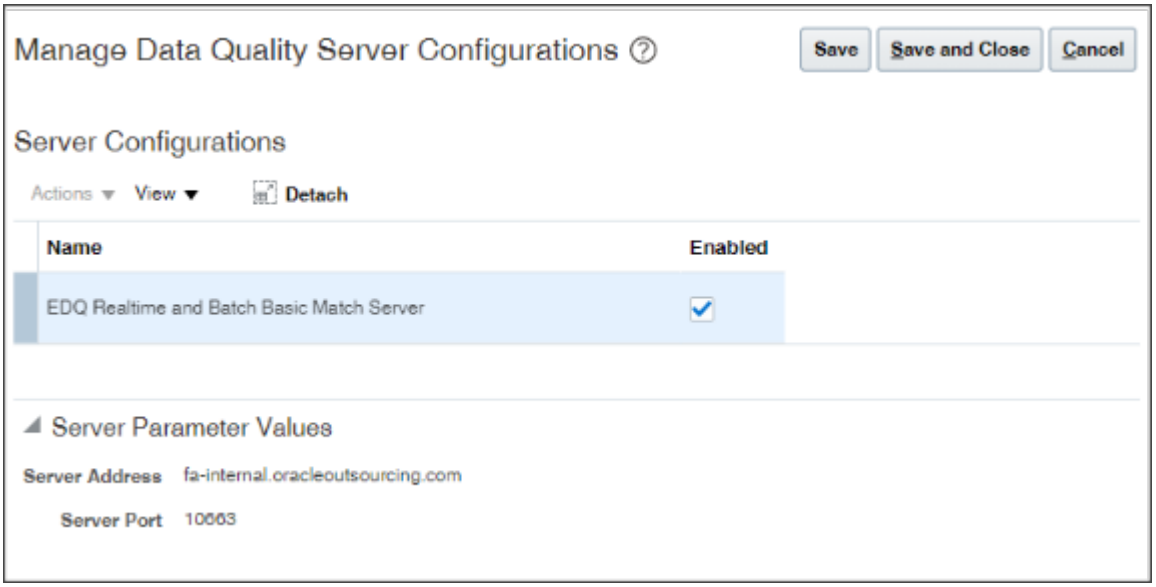
In the background, the application uses sets of rules, called matching configurations, to identify potential account and contact duplicates. If you license Oracle Customer Data Management, you can create matching configurations of your own and you can also check for duplicates in your data in batches. Oracle Customer Data Management includes industrial-strength data cleansing features, but the basic duplicate checking you're enabling here's available free of additional charges.

If you're using Oracle Financials, the application checks for potential duplicates in financial accounts as well as sales accounts.

Enable the Server Used for Duplicate Matching

1. In Setup and Maintenance, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Server Configurations

2. Click the **Enabled** option for **EDQ Realtime and Batch Basic Match Server**.



3. Click **Save and Close**.

Activate the Existing Duplicate Matching Configurations

1. In Setup and Maintenance, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Enterprise Data Quality Matching Configurations

2. Activate each of the matching configurations provided by Oracle:
    - Account Duplicate Identification
    - Contact Duplicate Identification
    - Address Duplicate Identification

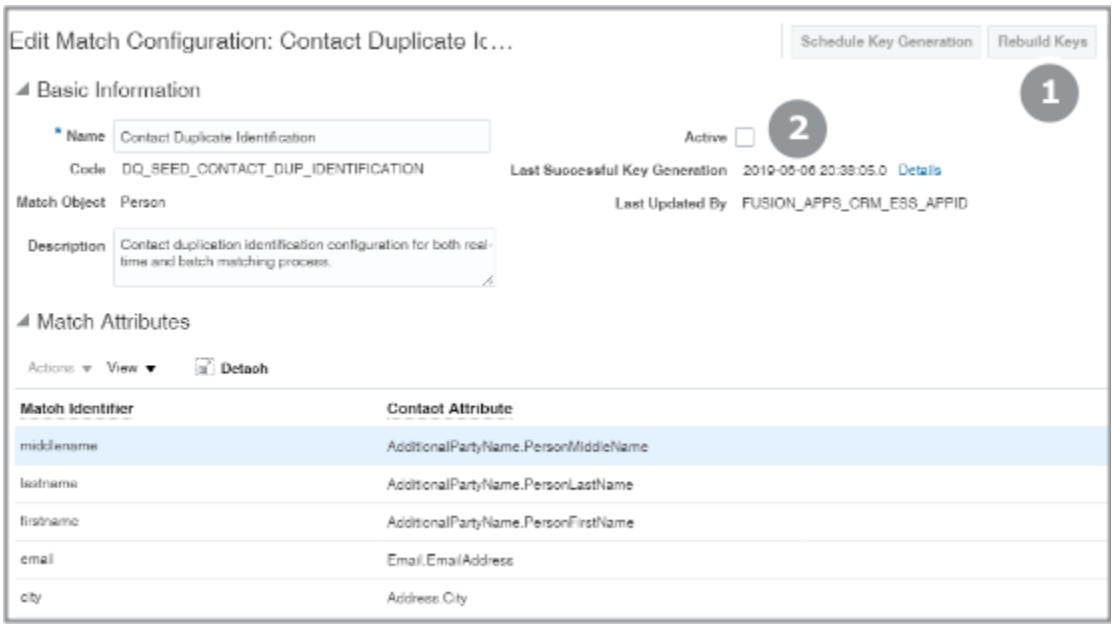
    Here's how:

    a. Drill down into the configuration to edit it.
    b. In the Edit Match Configuration page, click **Rebuild Keys**.

       The application warns you that all existing keys will be purged.
    c. Click **Yes**.

       The application starts the key generation process, which takes a few minutes to complete. The page doesn't automatically refresh the status, but you can monitor the progress of the process in the Scheduled Processes work area (**Navigator** > **Tools** > **Scheduled Processes**)

       Here's a partial screenshot of the Edit Match Configuration page highlighting the Rebuild Keys button (callout 1), which is disabled after you start the process. When the process completes, the page displays the Active option (callout 2).



    d. Select the **Active** option.
    e. Click **Save and Close**.
    f. Reply **Yes** to the warning.
    g. In the Incremental Key Generation window, click **Submit**.

When you're done, all three configurations should now have a check mark in the Active column on the Manage Enterprise Data Quality Matching Configurations page.

Set Profile Options for Account Matches

Set two profile options:

- Duplicate Account Notification (ZCM_ACC_DUP_NOTIFICATION)

  This profile option enables the UI that shows notifications of potential duplicate accounts. Make sure that this profile option is set to TRUE.

- Exact Account Name Match (ZCM_ACC_EXACT_NAME_MATCH)

  If the data quality matching configuration fails to identify potential account duplicates, this profile option enables checks for potential duplicate records using exact name matches. Setting this profile option to TRUE is optional because the data quality checking configuration uses multiple attributes, including the name, D-U-N-S number, tax ID, and address to identify potential duplicates. The exact name match is just an extra check.

1. In the Setup and Maintenance work area, open the **Manage Administrator Profile Values** task:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
2. From the search region of the Manage Administrator Profile Values page, **Profile Option Code** field, enter the profile option code name for one of the profiles:
   - ZCM_ACC_DUP_NOTIFICATION
   - ZCM_ACC_EXACT_NAME_MATCH
3. Click **Search**.
4. Set the profile option value to the TRUE.
5. Click **Save and Close**.

How can I enable multiple addresses for accounts?

Here's how to enable multiple addresses for accounts. You can use similar steps to enable multiple addresses for contacts and for other sales objects that display addresses, such as households.

Create and Enter a Sandbox

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

1. In the Navigator, click **Configuration** > **Sandboxes**.
2. Click **Create Sandbox**.
3. Enter a sandbox name.
4. Select **Active** for **Application Composer**.
5. Click **Create and Enter**.
6. From the sandbox **Tools** menu, select **Application Composer** to enter the tool.

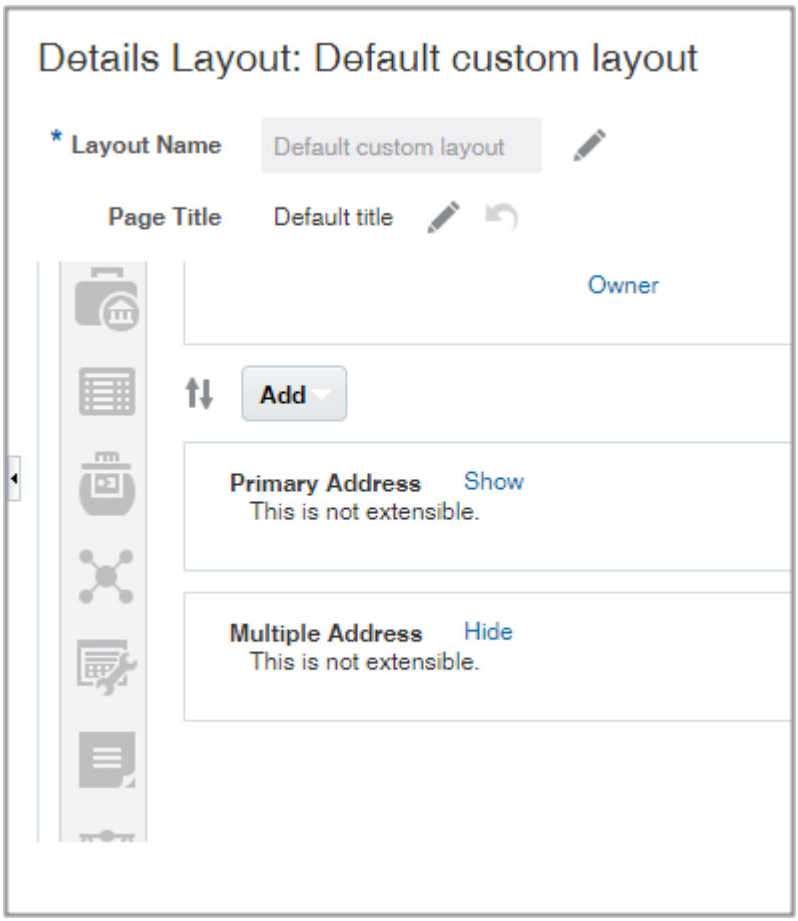
Display Multiple Addresses on the Account Profile Tab

While in Application Composer, expose Multiple Addresses in a custom layout:

1. Open the **Standard Objects** node on the left panel.

   Open the **Account** node.
2. Click **Pages**
3. On the Application Pages tab, scroll down to the **Details Page Layouts** section.
4. Select **Standard Layout** and click **Duplicate**.
5. In the Duplicate Layout window, enter a new name for your layout or just click **Save and Edit**.
6. Drill down into your layout.
7. Click the **Profile** tab in the Subtabs Region.
8. Scroll down until you see the **Primary Address** and **Multiple Address** selections.
9. Click the **Show** link for **Multiple Address**.
10. Click **Hide** for the **Primary Address**.

    Multiple Address now displays **Hide** and **Primary Address** displays **Show**. Here's a screenshot:



   Note: You can't expose both regions at the same time.

11. Click **Done** to leave Application Composer.

Expose the Type Field

Expose the address Type field in the Add Address window. As they add addresses, salespeople use the field to indicate if an address is a sell-to address, a bill-to address, and so on. Exposing the field on the Add Address window automatically adds it to the Edit Address window as well.

1. While in the sandbox and Application Composer, open the **Standard Objects** node on the left panel.

   Open the **Address** node.
2. Click **Pages**
3. On the Application Pages tab, **Creation Page Layouts** section, select the **Standard Layout** and click **Duplicate**.
4. In the Duplicate Layout window, enter a new name for your layout or just click **Save and Edit**.
5. Drill down into your layout.
6. Click **Edit** (the pencil icon) for Create and Edit Address.
7. In the Configure Detail Form section, locate the Type field in Available Fields pane and move it to the Selected Fields pane.
8. Click **Save and Close**.
9. Click **Done** to leave Application Composer.

Publish Your Sandbox

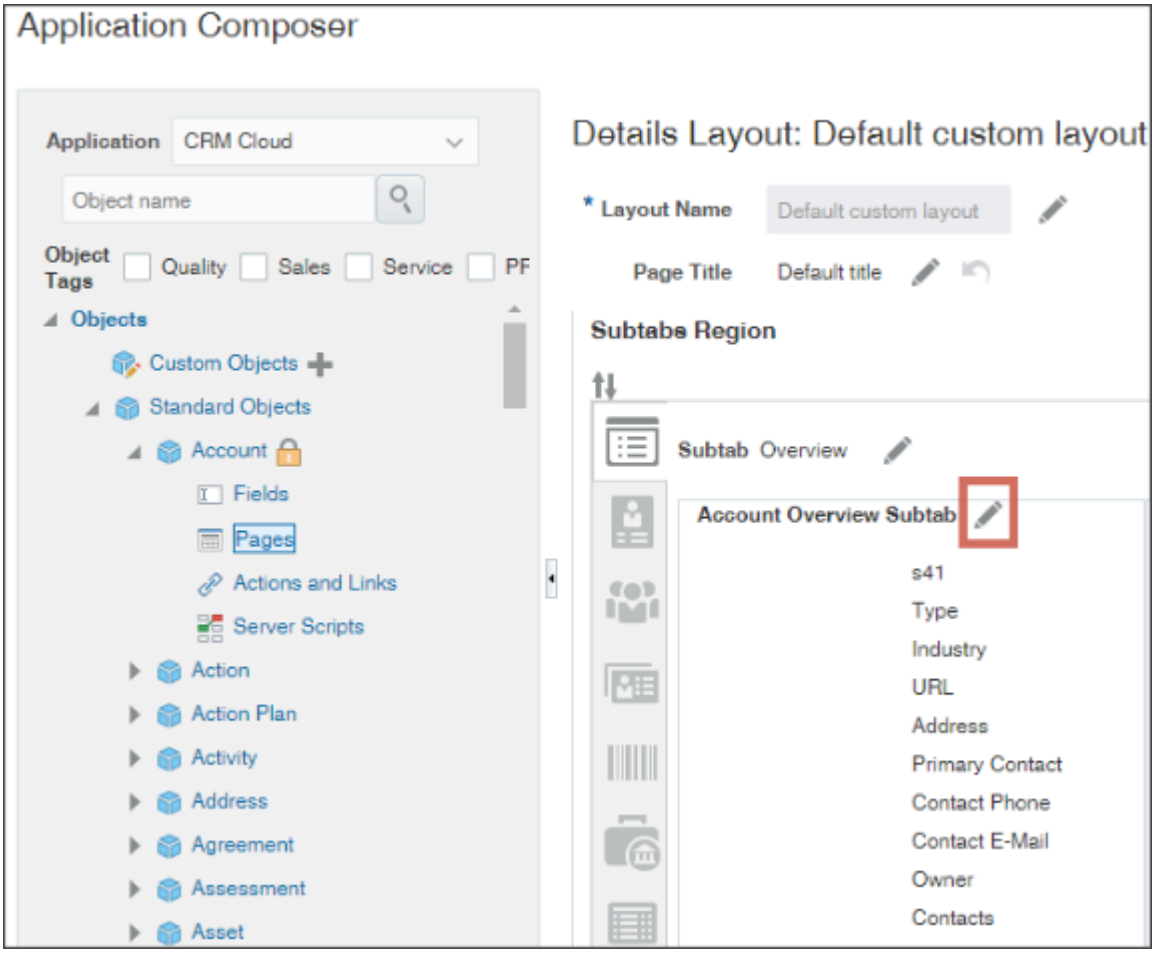
1. Click **Navigator** > **Configuration** > **Sandboxes**.
2. On the Sandboxes page, click the name of the sandbox.
3. Click **Publish**.
4. Click **Continue** to publish.
5. When the sandbox completes publishing, click **Done**.

Display the Account at the Top of the Account Hierarchy in the Account Overview Tab

You can make it easy for salespeople to see the top of the account hierarchy by exposing the Ultimate Parent field on the Edit Account Overview tab. If you don't expose this field, salespeople can still view the top account, but they must traverse the account hierarchy itself.

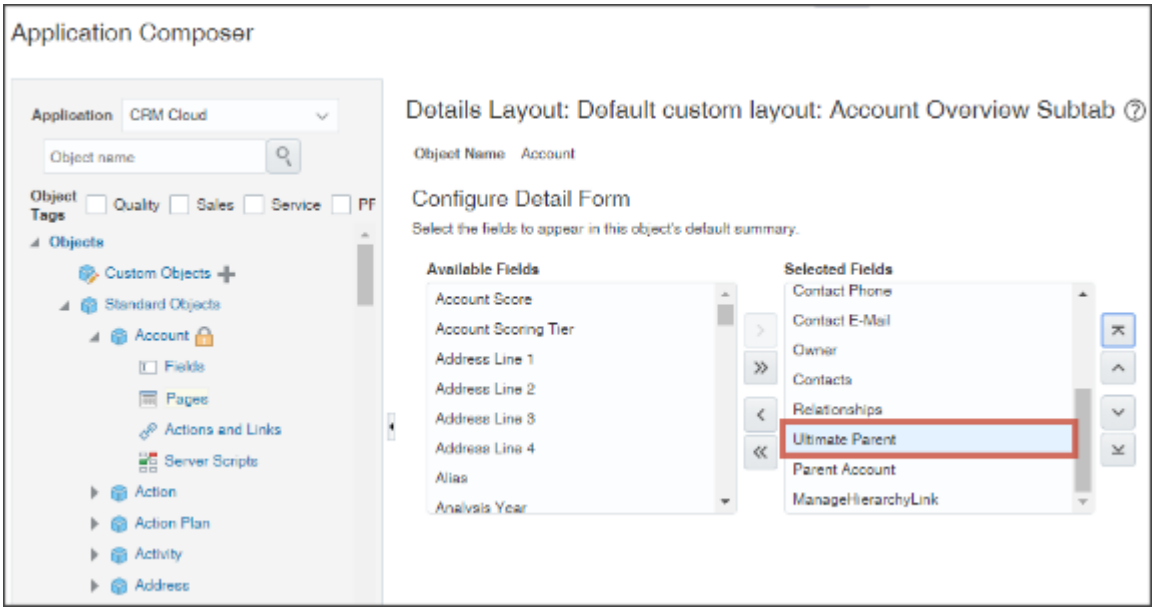
1. Create and enter a sandbox with Application Composer.
2. In the navigation tree, expand Standard Objects, and then expand Account
3. Click the **Pages** node.
4. Ensure that the **Application Pages** tab is selected.
5. In the Details Page Layouts region, open a custom layout or create a custom layout by duplicating the standard layout.

6. In the custom layout, click **Edit** (the pencil icon highlighted in the screenshot) for the Account Overview Subtab.



7. In the Configure Detail Form, select **Ultimate Parent** from the list of Available Fields and move it to the list of Selected Fields.

8. Move the field right above the Parent Account field.



9. Click **Save and Close**.
10. Click **Done**.
11. To test the changes, view the Account Overview page for an account.
12. Publish the sandbox.

Manage Address Types

You can specify what address types are used in your sales application by editing the lookup type Party Site Use Code (PARTY_SITE_USE_CODE).

1. In Setup and Maintenance, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Show: All Tasks
   - Task: Manage Standard Lookups
2. On the Manage Standard Lookups page, search for the lookup type **PARTY_SITE_USE_CODE** or the meaning **Party Site Use Code**.
3. Your sales application uses only those values that are enabled and include the tag SALES_CLOUD.
   Here are the available values for sales:

Lookup Code	Meaning
BILL_TO	Bill to
SELL_TO	Sell to

Lookup Code	Meaning
SHIP_TO	Ship to

4. You can enable additional values for your sales application by entering SALES_CLOUD in the **Tag** field.
5. You can also create address types of your own using the **New** button.
6. Click **Save and Close**.

Related Topics

- Can I modify the phone types for accounts and contacts?

Show Account Invoices to the Sales Team

Let your sales team see the outstanding and paid invoices of accounts they handle. Enable the Invoices panel on an account foldout view so that invoices related to the account show up on the panel.

What You Need to Have Before Setting Up

- Sales and Oracle Financials integrated.
- The Sales accounts need to link to the financial billing accounts for the invoices to show up.

Setups Involved

- Add the AR_VIEW_RECEIVABLES_INVOICE_PRIV privilege to the sales administrator, sales manager, and sales representative roles, and assign users who need to see the invoices.
- Enable the Show Invoices checkbox in Smart Actions in Application Composer.
- Enable the Invoices Panel on an object's foldout view using the Visual Builder Studio.

Enable Show Invoices in Smart Actions

1. Enter an active sandbox and navigate to **Application Composer** > **Smart Actions**.
2. Search for **Show Invoices**.
3. Ensure that the **Enabled** checkbox for **Show Invoices** is selected.
4. Save your changes and publish the sandbox.

Enable the Invoices Panel on an Object's Foldout View Using Visual Builder Studio

1. Create a workspace in Visual Builder Studio.
2. Sign in to the sales application and Visual Builder Studio simultaneously.

3. In Sales for Redwood, go to the foldout view of any account to add the Invoices panel.
4. On the Account foldout view, click your user name in the global header and select **Edit Page in Visual Builder**.
5. In the Visual Builder Studio, open the workspace you just created and click the **Source** icon on the navigation pane.
6. From Source, navigate to **extension 1** > **sources** > **self** > **applications** > **digital-sales** > **flows** > **mycustomers** > **pages** > **accounts-page.json**.
7. In the JSON tab, add the Invoices panel to the **displayProperties** list.
8. Click the **play** icon to see the preview of the account foldout view with the Invoices panel.
9. Click **Publish**.

   The Invoices panel appears on the account foldout view.

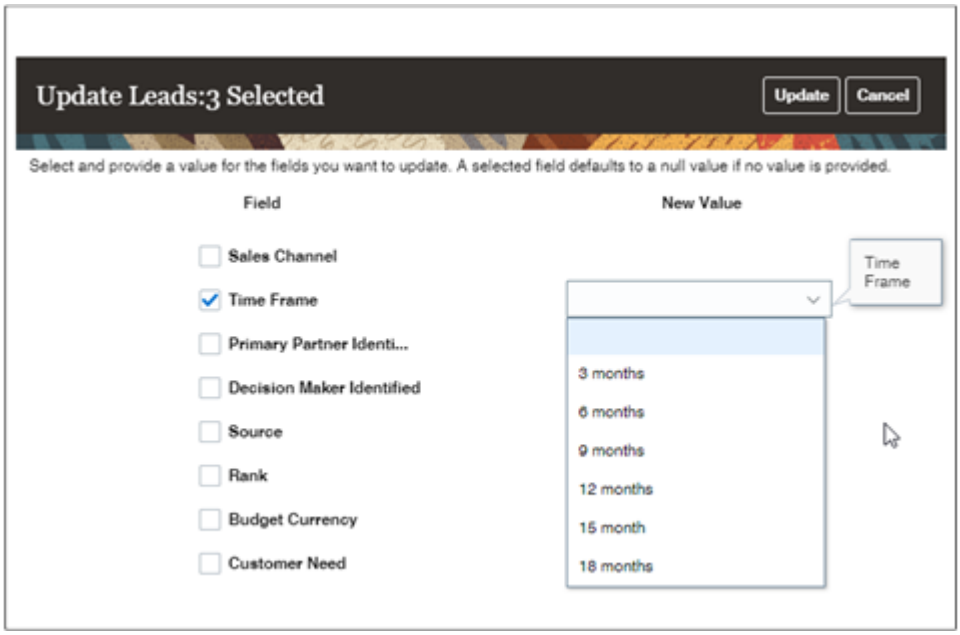
8 Mass Update and Inline Editing

Mass Update

With mass update, salespeople can update fields on multiple records at the same time with a few clicks. No need to drill into and edit each record individually. In Sales for Redwood , this feature is available by default. In classic Sales, you must complete the updates listed in this chapter.

In the Workspace classic Sales UI and in the new work areas that use Adaptive Search, updating ownership and status of multiple leads is as simple as selecting the leads in the landing page list, right-clicking, and selecting the **Update** action.

Salespeople get a list of fields they can update such as the one shown in the screenshot.



Mass update is also available in the classic Sales UI legacy work areas that haven't been converted to Adaptive Search, including Business Plans, Competitors, Service Requests, and Products. Because these work areas use the older CRM Search technology, you must set these up separately. Inline editing is available only in these legacy work areas.

Note: Mass update isn't available for dynamic choice list (DCL) fields with dynamic filters.

Setup Overview

Here's how to enable mass update and inline editing in Classic Sales UIs.

Step	Applies To	Description	Navigation	Where to Get More Details
1	Classic Sales	Enable mass update of records in Workspace and the new single-object work areas, including Accounts, Contacts, Leads, and Opportunities.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Configure Adaptive Search** > **Parameters**	See the topic: *Enable Mass Update*
2	Classic Sales	Optionally, enable mass update of records in the work areas that haven't yet been converted to the new Adaptive Search technology. You can do this by adding the Update action to a custom layout of the landing page in Application Composer. You can also specify the maximum number of records users can update in a profile option.	• **Navigator** > **Configuration** > **Application Composer** • **Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Administrator Profile Values**	See the topics in the section Inline Editing in Legacy Work Areas: • *Enable the Mass Update Action* • *Enable Inline Editing of Records Displayed in Lists*
3	Classic Sales	Optionally, you enable the inline editing in the legacy work areas, by setting the profile option Click-to-Edit on Landing Page Enabled to Yes.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Administrator Profile Values**	See the topic: *Enable Inline Editing of Records Displayed in Lists*

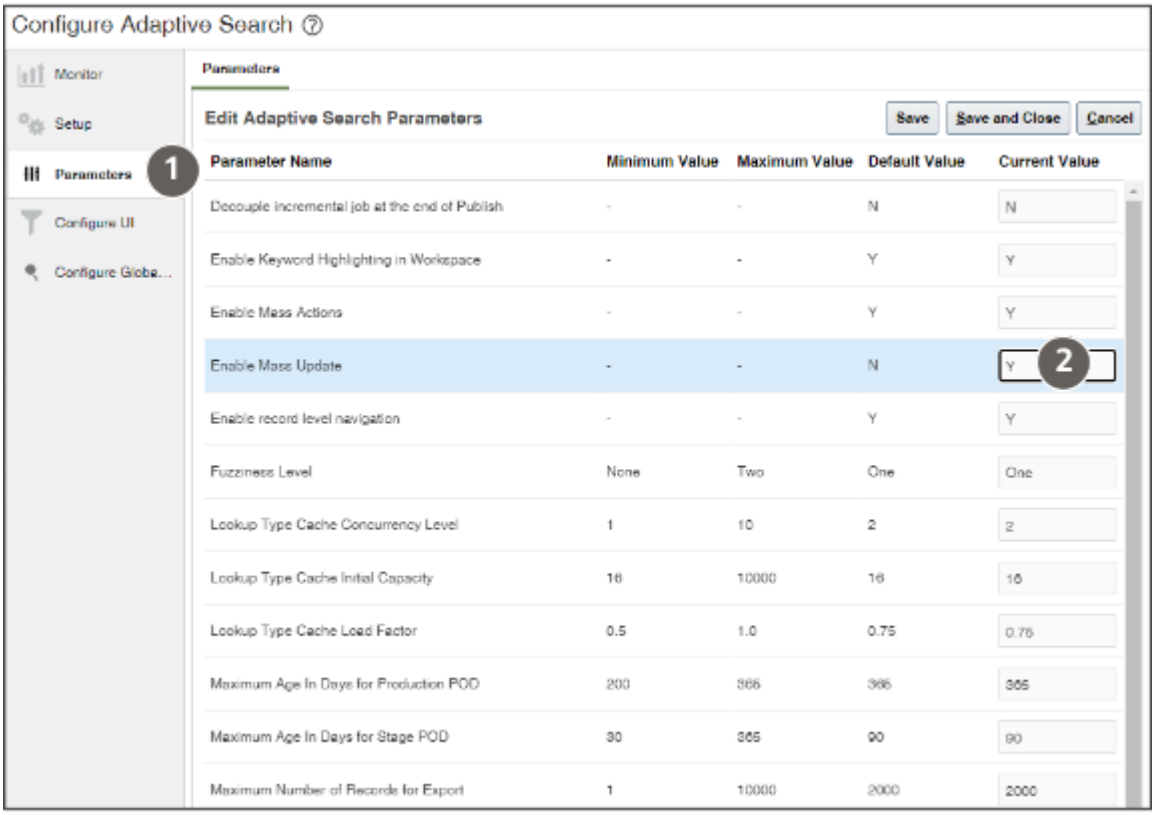
Enable Mass Update

Here's how to make it possible for salespeople to update multiple records at the same time while using Workspace, Accounts, Contacts, Leads, Opportunities, and the other work areas in Classic Sales that now use Adaptive Search.

1. Navigate to the Setup and Maintenance work area, open the **Configure Adaptive Search** task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Show: All Tasks
    - Task: Configure Adaptive Search
2. On the Configure Adaptive Search page, click **Parameters** (callout 1).

3. Click **Edit**.

   Here's a screenshot of the page after you click Edit.



4. In the **Enable Mass Update** row, **Current Value** column, enter `Y` (callout 2).
5. Click **Save and Close**.

Enable Mass Update and Inline Editing in Legacy Work Areas

Enable the Mass Update Action

You enable mass update for the legacy work areas that still haven't been updated to behave like Workspace, by creating a custom layout of the landing page in Application Composer. Within the layout, you specify which fields users can update.

Create and Activate a Sandbox

1. Click **Navigator** > **Configuration** > **Sandboxes**.
2. On the Sandboxes page, click **Create Sandbox**.
3. Enter a name for your sandbox.

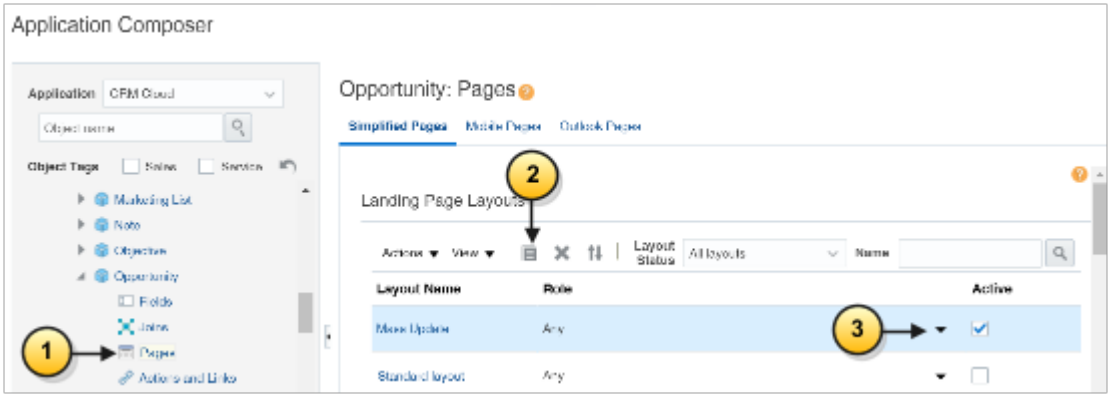
4. In the All Tools section, select **Application Composer** as the tool you want to activate for this sandbox.
5. Click **Create and Enter** to create and enter the sandbox.

The application displays a bar at the top of the page with the sandbox name.

Enable the Update Action and Specify the Fields in a Custom Layout

1. Open Application Composer, **Navigator** > **Configuration** > **Application Composer**.
2. In the navigation tree, expand **Standard Objects**, and then expand the object you want to modify. For example, expand the **Opportunity** object.
3. Within the object you're modifying, click the **Pages** node.
4. Ensure that the **Simplified Pages** tab is selected.
5. In the Landing Page Layouts region, select the Standard Layout and click **Duplicate Landing Page Layout** (the document icon).
6. In the Duplicate Layout window, enter a name for your layout. The Standard Layout is the source.
7. Click **Save and Edit**.
   Notice that your new layout is now active. The Standard Layout you copied is inactive.
   Here's a screenshot of Application Composer showing the Opportunity: Pages region. Callouts highlight some of the features.

Callout Number	Description
1	Pages node
2	Duplicate Landing Page Layout button
3	Role Name (down arrow icon) that you use to specify job roles that see the layout.



8. Edit the new layout to add the Update action and select the fields that users can update. Here are the steps for the Opportunities landing page:
   a. Click **Edit** (the pencil icon) on the **Fuse Opportunity Overview Table**.
   b. Navigate to the Configure Detail Form: Buttons and Actions region.
   c. In the Available Actions window, move the **Update** action to the Selected Actions pane. You can either double-click or use the arrow buttons.

d. Scroll down to the Configure Mass Update Fields region.
e. Move the fields you want users to update to the Selected Fields column.

> **Tip:** If entry in a field depends on the value of another field, you must expose both fields. For example, users can't enter a sales stage unless they select the sales method first.

f. Click **Save and Close**, then **Done**.

9. By default, your custom layout is available to everyone. Here's how to restrict use of layout to specific job roles:

a. Select the layout and click **Role Name** (the down arrow icon).
b. In the Select: Roles window, click **Show available predefined roles** and **Specific Roles**.
c. Move the job roles to the Selected Roles column and click **OK**.

Test and Publish the Sandbox

Test your new layout in the work area where you enabled it and publish the sandbox.

1. Click on the sandbox name in the sandbox toolbar and select **Publish**.
2. Click **OK** in the dialog box to navigate to the Sandbox Detail page.
3. In the Sandbox Detail page, click **Publish** again.
4. Click **Continue to Publish** in the warning message to confirm that you want to publish.

Specify the Maximum Number or Records Users Can Update at the Same Time

You can specify the maximum records users can update at the same time in the legacy work areas by setting two profile options.

Note the following:

- By default, users can update a maximum of 25 records at the same time.
- The maximum number of records you can update is 500.
- For custom objects, the maximum number is set to 25 records. You cannot change this number.

Application Object	Profile Option
Activities	Activity Mass Update Threshold Value (ZMM_MASS_UPDATE_THRESHOLD)
• Accounts • Assets • Contacts • Leads • Opportunities	Mass Update Threshold Value (ZBS_MASS_UPDATE_THRESHOLD)

Set the Profile Options

Here's how to set the profile options:

1. In Setup and Maintenance, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. In the Manage Administrator Profile Values page, search by the profile option name or code.
3. Click the profile option name link.
4. Set the profile option value.
5. Save your changes.

Enable Inline Editing of Records Displayed in Lists

Enabling inline editing of records in landing page lists saves the extra clicks it takes to drill down into individual records. Inline editing is available in the legacy work areas.

You enable the feature by setting the system profile option Click-to-Edit on Landing Page Enabled.

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. In the search region of the Manage Administrator Profile Values page, enter the profile option code name ZBS_ENABLE_CLICK_TO_EDIT in the **Profile Option Code** field.
3. Click **Search**.
4. Click on the profile option name in the search results.
5. Set the profile option value to Yes.
6. Click **Save and Close**.

9 Leads

How to Handle Leads from External Sources

The leads you get from the web, from trade shows, from marketing campaigns, or from lists you purchased aren't always of the highest quality. You want to contact the potential customer and verify the information before creating new account and contact records in your application. And you don't want to pass worthless leads to your highly paid and busy field sales.

This chapter outlines how you can set up a process for creating, verifying, and qualifying these kinds of net new leads. We are calling these leads "net new" leads because the account and contact information stays in the lead until the lead is qualified and converted. Our use case follows the common practice of using inside sales to do the initial lead qualification. But there's nothing stopping you from modifying the use case to suit your needs.

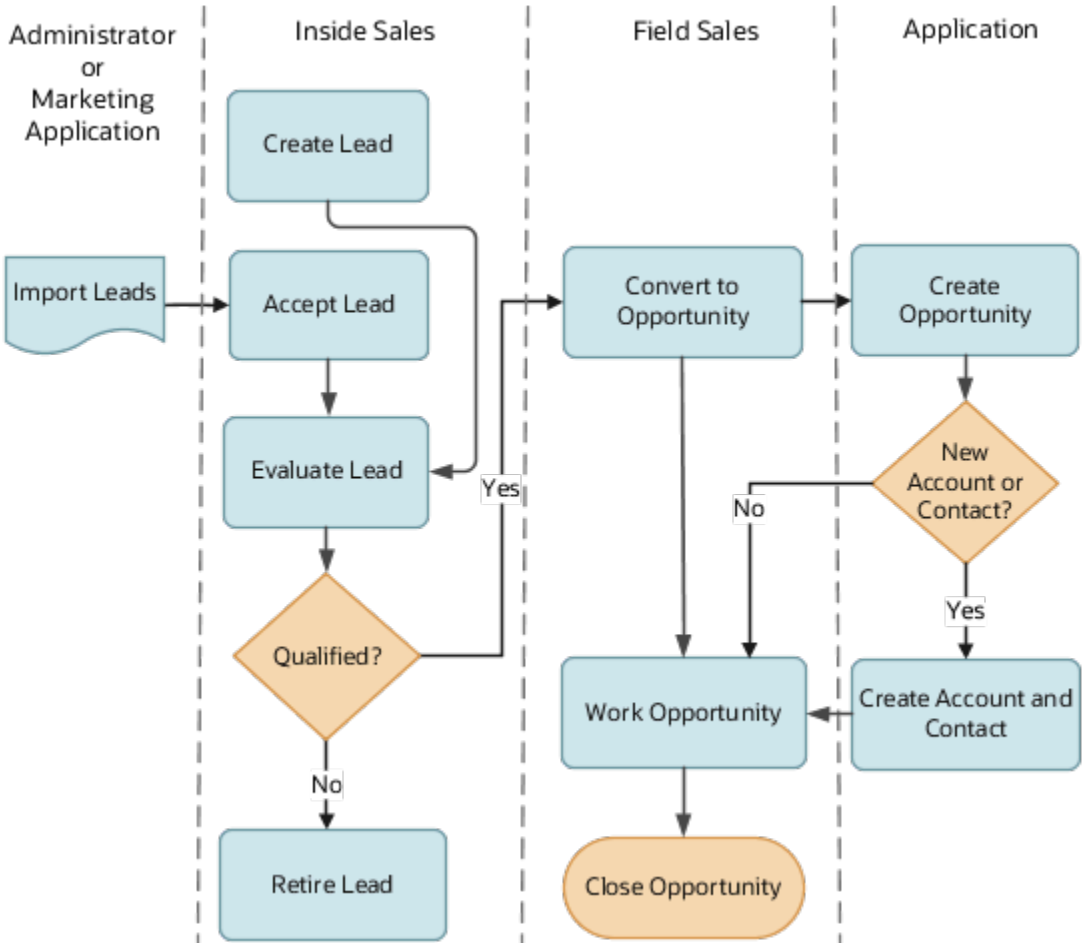
Use Case Overview

The fictitious company, Vision Corp., uses a team of inside sales representatives to verify the information in leads. All qualified leads are automatically assigned to field sales representatives for further assessment and conversion into opportunities. Here's an overview of the process:

1. Net new leads can get created in one of three ways:
    - The leads are imported, perhaps by a sales administrator using the import macro you download from My Oracle Support.
    - The leads get created from an integration with a marketing application, such as Oracle Eloqua.
    - A salesperson can also create net new leads manually in the UI.
2. Using an assignment rule you create, the application automatically assigns all inside sales representatives to the sales team on each of the imported leads. Being on the sales team, makes it possible for the inside sales representatives to view and update the leads, but it doesn't assign them ownership of the leads. Salespeople become owners of a lead only when they accept a lead.
3. Individual inside sales representatives review the list of leads and accept the leads they want to work on. Accepting a lead lists you as the lead's owner.
4. The inside sales representatives verify the information in each lead. They check for potential duplicates, contact the customer, and answer a standard list of questions in a qualification template that you set up for them.
5. When leads meet the qualification criteria, the inside sales representatives set the leads to the qualified status.
6. If the leads don't meet the criteria, the inside sales representatives retire them instead.
7. The application automatically assigns the qualified lead to sales territories in the field sales organization.
8. Field sales representatives review the individual leads assigned to them, and convert the promising ones to opportunities.

   The representative doing the conversion becomes the owner of the new opportunity.
9. During the conversion process, the application creates new account and contact records of type prospect. The lead is automatically set to a converted status and linked to the account and opportunity records.

Here's a diagram that illustrates the processes:



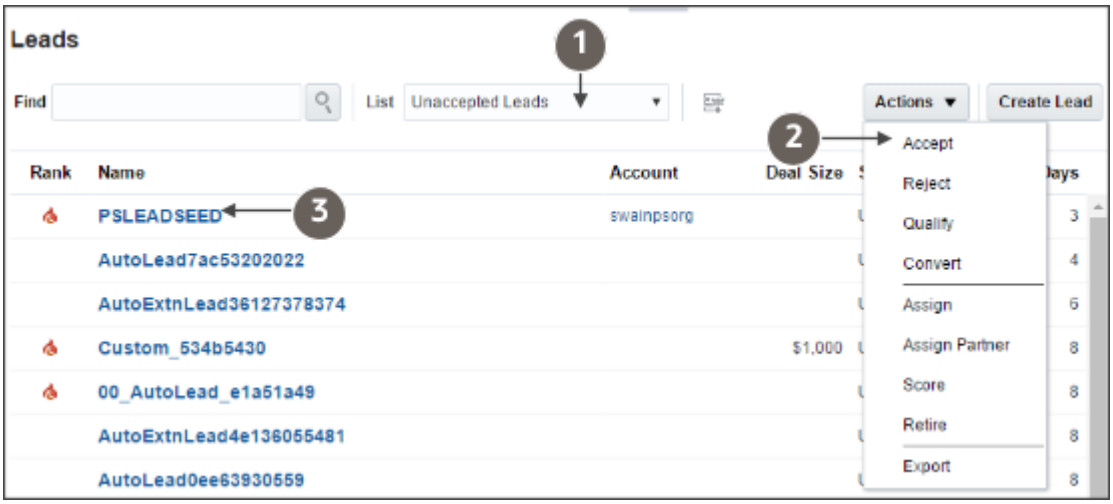
How Inside Sales Works Sales Leads

Here's how salespeople work leads in the Classic Sales UI. Because of the changed UI, the process in the Sales for Redwood UI is a bit different. For information about working with Leads in Sales for Redwood, see the Leads chapter in the *Using Sales for Redwood* guide.

1. To find the imported leads to work on, the inside sales representatives select the **Unaccepted Leads** list (callout 1 in the screenshot).

   You create the saved search for this list during setup.

2. Representatives accept ownership of the leads that they want to work on, either by:
    - Selecting the **Accept** from the **Actions** list (callout 2).
    - Or by drilling down on the lead name (callout 3) and clicking the **Accept** button in the Edit Lead page.



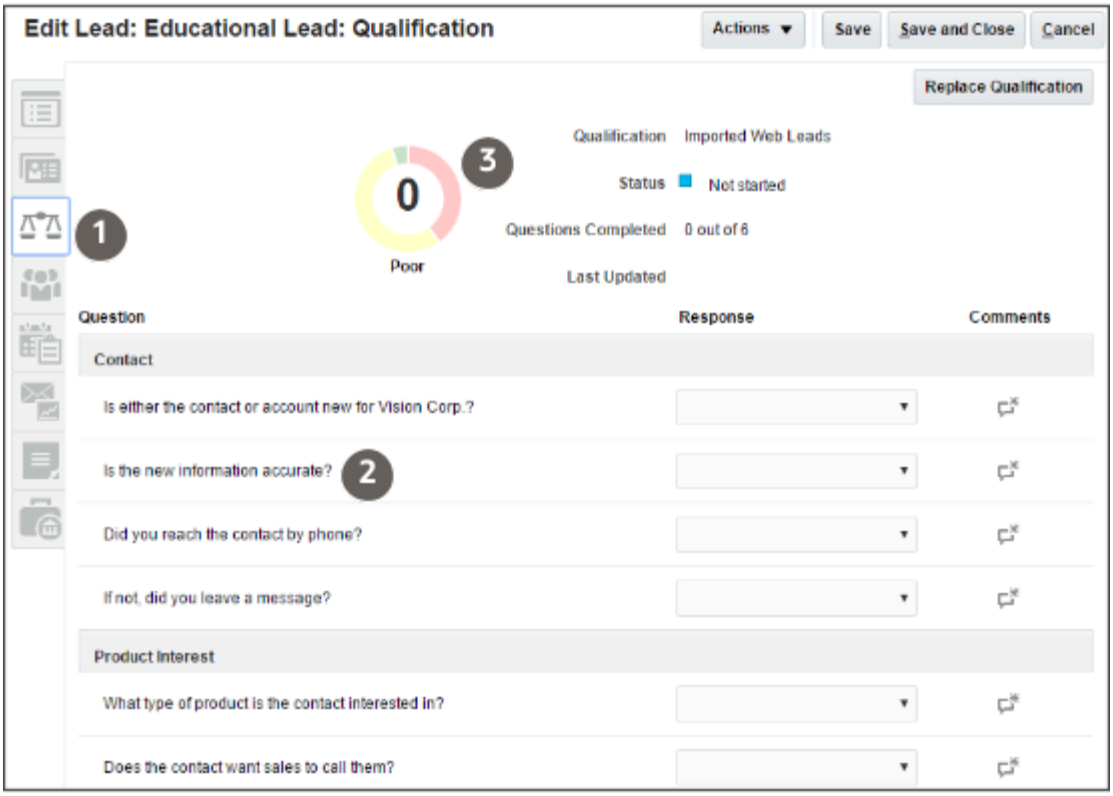
By accepting the lead, a representative becomes the lead owner and can now see the lead listed in the **My Open Leads** list.

3. Inside sales representatives check if the account and contact information in the lead duplicates information already in the sales application. In our use case, the representatives check for duplicates manually in the leads UI by selecting the **Check for Duplicates** action.
4. The representatives contact the customer and qualify the leads, guided by the questions you set up as part of a qualification template. Using the qualification template, while not mandatory, ensures that everyone follows the same procedure for qualifying leads.

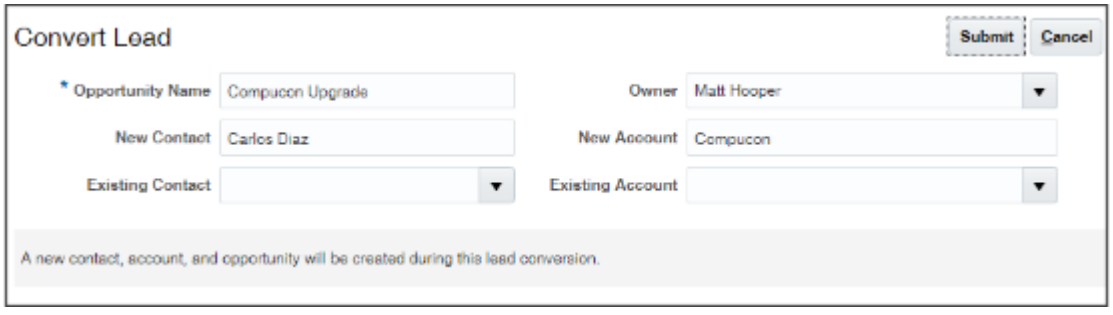
> **Note:** Qualification templates are replaced by Orchestration processes in Sales for Redwood.

Here's a screenshot of a sample qualification template in the Classic Sales UI. Salespeople access the template on the Qualification tab (callout 1) of the Edit Lead page. They answer the questions that you provide (callout 2). These questions are organized in question groups, which serve as headings on the page. As they answer the

questions, salespeople get visual feedback on the quality of the lead (callout 3). You select the ratings and color schemes during qualification template setup.



5. When inside sales representatives set the lead status to **Qualified**, an assignment process assigns the lead to the appropriate sales territory. The process also adds the appropriate field sales representatives to the sales team.
6. The field sales representatives convert the lead to an opportunity by selecting the **Convert** from the **Actions** menu after viewing the lead.
7. You can rename the opportunity and change ownership in the Convert Lead window (shown in the screenshot).



How You Import Leads Depends on the Lead Type

How you import leads depends on whether you're importing the net new leads described in this chapter or leads linked to existing accounts and contacts. Here are the main differences:

- Net new leads

  You import the account and contact as part of the lead business object. Account and contact records are created only when the sales representatives convert the leads to opportunities. You can use the Excel macro provided by Oracle to import these types of leads.
- Leads linked to existing accounts and contacts

  You must use IDs to reference the existing accounts and contact record in your import file. You can use the IDs you generated in your account and contact import files or you can export IDs from your application. You cannot use the leads import Excel macro for this type of import.

This chapter discusses only the import of net new leads using the import macro. See the *Understanding Import and Export Management for Classic Sales and Fusion Service* guide to understand how to import the other types of leads.

Overview of Leads Setup

Here are the setup steps required to set up the sample leads use case covered in this chapter.

Step	Applies To	Where to Find More Information
Step 1 To let salespeople enter account and contact information as text in net new leads in classic Sales, you must expose two fields, New Account and New Contact, on the appropriate lead pages. In Sales in the Redwood UX, salespeople can enter information as text or select existing accounts and contacts in the same field. No UI change is required.	Classic Sales	*Make Changes to the Lead Pages Add the New Account and New Contact Fields to the UI*
Step 2 Create the assignment rule to assign the leads to the inside salespeople who will qualify them.	Both classic Sales and Sales in the Redwood UX	*Set Up the Assignment Rule for Assigning Leads*
Step 3 Set two profile options to enable lead assignment. Setting Lead Assignment Mode to Both enables both rule-based and territory-based assignment. Setting the Assignment Rule for Rule Based Lead Assignment profile option tells the application which rule category to use.	Both classic Sales and Sales in the Redwood UX	*Enable Lead Assignment*
Step 4	Both classic Sales and Sales in the Redwood UX	*Change the Values for Lead Rank and Lead Channel*

Step	Applies To	Where to Find More Information
Before importing your leads, you can optionally change the values provided by Oracle for lead rank and the lead source channel. Salespeople can use lead rank, for example, hot or cold, to prioritize leads to work on next. The lead source channel indicates if the lead came from the web, an email, and so on.		
Step 5 Import leads using the lead import macro. You can import up to 5,000 leads at a time.	Both classic Sales and Sales in the Redwood UX	*Import Leads Using the Import Macro*
Step 6 Run the lead assignment process twice: the first time to assign the imported leads to inside sales and the second time to assign qualified leads to field sales. You can also schedule assignment process to run at regular intervals.	Both classic Sales and Sales in the Redwood UX	*Run the Lead Assignment Process*
Step 7 Create a list that inside salespeople use to view the imported leads that are available for them to work on.	Sales in the Redwood UX only	*Display List of Unaccepted Leads*
Step 8 Sign in as one of the inside salespeople and one of the field salespeople to test your setup.	Both classic Sales and Sales in the Redwood UX	*Verify Your Leads Setup*
Step 9 Schedule the process Update Leads with Most Recent Contact and Account Information to run periodically in order to make sure any changes to account and contact information are reflected in leads.	Both classic Sales and Sales in the Redwood UX	*Update Leads with Most Recent Contact and Account Information*
Step 10 Create a list that inside salespeople use to view the imported leads that are available for them to work on.	Classic Sales only	*Display List of Unaccepted Leads*
Step 11 Specify which qualification template you want to appear in a lead by default by setting the profile option Advanced Lead Qualification Enabled. You can specify one template as the default for all leads, or have different defaults for different users and products.	Classic Sales only	*Select Default Lead Qualification Templates*

Set Up the Assignment Rule for Assigning Leads

You can use assignment rules to automatically assign your leads to sales resources or to sales territories. In this example, you set up a rule that assigns imported leads to sales resources, the inside sales representatives.

Creating an assignment rule involves the following three major steps:

1. Create a rule set.
2. Create the rule.
3. Publish the rule set.

Create the Rule Set

You must create a rule set before you create your rule. The rule set makes it possible for you to have more than one rule for your lead assignment.

1. Open the **Manage Sales Lead Assignment Rules** task from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Leads
    - Show: All Tasks
    - Task: Manage Sales Lead Assignment Rules
2. Select the **Sales Lead Resource Rule Category** from the **Category** list. You're assigning resources to the leads.
3. Create a rule set:
    a. Click **Add Row** (plus sign icon) in the Rule Sets region toolbar.
    b. Enter a rule set name in the Name field and an optional description.
    c. Make sure that **All** is selected as the **Filter**.

    The **All** setting ensures that all the inside sales representatives are assigned to all of the lead sales teams so each sales representative can work any of the leads you import.

    If you selected **Random** as your filter value, then the inside sales representatives are assigned to the lead teams at random. Each representative would be assigned approximately to the same number of leads, but the representatives could not view and work on the leads assigned to the others.
    d. Save.

Create the Rule

Now create the rule to assign the inside sales representatives to all imported leads that are unqualified.

1. With the rule set you just created selected, click **Create** (the plus sign icon) in the Rules region.

    The Create Rule page appears.
2. Enter a rule name and an optional description.
3. In the Conditions region, make sure the **All conditions met** operator is selected for the **Rule Applies If** field.
4. Click **Add Row** (the plus sign icon).
5. Now enter the first of the two conditions. This first condition ensures that the rule only assigns imported leads.

Field	Selection
Object	Sales Lead
Attribute	Import Activity Identifier
Operator	Is not blank

6. Click **Add Row** again and enter the second condition. This condition assures that the rule assigns only unqualified leads.

Field	Selection
Object	Sales Lead
Attribute	Status
Operator	Equals
Value	Unqualified

7. In the Action region, enter the names of the inside sales representatives who work the imported leads:
    a. Click **Select and Add** (plus sign icon).
    b. Search by name in the Select and Add window.
    c. Select the name.
    d. Click **OK**.

    Clicking **Apply** instead keeps the window open so you can add additional resources.
8. Click **Save and Close**.

You're returned to the Manage Sales Lead Assignment Rules page.

Publish the Rule Set

For the rule to become active, you must publish the rule set after each change by clicking **Save and Publish** on the Manage Sales Lead Assignment Rules page. The application lists the day and time when the rule was last published.

Enable Lead Assignment

Enable lead assignment using both rules and sales territories by setting these two system profile options. Territory assignment assigns sales territories to the lead, not individual resources. Resources are added to the lead only by resource assignment rules.

System Profile Option Display Name	Value to Enter	Description
Lead Assignment Mode	Both	Specifies if you're using rules, sales territories, or both for assigning leads. Vision Corp. is using both.
Assignment Rule for Rule-Based Lead Assignment	Sales Lead Resource Rule Category	Specifies the rule category for the rule used for lead assignment.

Here's how to set the profiles:

1. Open the task **Manage Sales Lead Profile Options** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Leads
    - Task: Manage Sales Lead Profile Options
2. Enter the profile option name in the **Profile Display Name** field.
3. Click **Search**.

   The application displays the profile option information.
4. For the Assignment Rule for Rule-Based Lead Assignment profile, click **Add** (the plus sign icon) in the Profile Values region and select **Site** as the **Profile Level**. For the Lead Assignment Mode system profile option, Site is already entered for you.
5. In the Profile Values region, select the value from the **Profile Value** list.
6. Click **Save** or **Save and Close**.

Change the Values for Lead Rank and Lead Channel

Optionally, you can change the values for lead rank and lead channel by editing their lookup types. Salespeople use lead ranks to prioritize leads to work on. The lead channel records the source of the lead.

The lookup type Lead Rank (MKL_LEAD_RANK_SETID) includes these predefined values:

- Cold
- Hot
- Warm

The lookup type Lead Channel (MKL_LEAD_CHANNEL_SETID) includes these predefined values:

- Direct Mail
- E-Mail
- Fax
- Model-based prediction
- Phone
- Rules-based prediction
- Sales visit
- Web
- Wireless Message

Here's how to change the existing values and to add new ones:

1. Open the task **Manage Set Enabled Lookups** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Leads
    - Show: All Tasks
    - Task: Manage Set Enabled Lookups
2. On the Manage Set Enabled Lookups page, search for either of the lookup type names by entering `Lead Channel` or `Lead Rank` in the **Meaning** field.

    The lookup type and the available values, called lookup codes, appear below.
3. Here's how to change a lookup codes:
    - For the existing values, you can change the wording displayed to the user by modifying the meaning or you can end date values you do not need.
    - You can add new values, by clicking **New** (the plus sign icon).
4. Click **Save and Close** when you are done.
5. If you made changes, you must remember to enter the changes on the **Lead Channel** and **Lead Rank** worksheets in the lead import macro.

Run the Lead Assignment Process

Here's how you assign leads using the rules you set up. For implementations similar to the Vision Corp. use case, you may need to run the assignment process multiple times. Vision Corp. runs it the first time to assign the imported leads to the inside sales representatives for lead qualification. The second time, the process assigns the qualified leads to field sales for conversion to opportunities. Assignment is not automatic, so you must run the process at regular intervals, perhaps once every hour.

1. Open the task **Manage Lead Processing Activities** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Leads
    - Task: Manage Lead Processing Activities

2. On the Lead Processing Activities page, click **Create Lead Processing Activity**.
3. To assign the leads you imported to inside sales for qualification, enter these parameters:

UI Region	Field	Entry
Activity Details	Process Type	Assignment
Lead Selection	Status	Unqualified
Lead Selection	Assignment Status	Unassigned
Schedule	Schedule Mode	Immediate

4. Click **Submit**.
5. Now create and submit a second activity to assign the leads to field sales after the leads are qualified. Enter these parameters:

UI Region	Field	Entry
Activity Details	Process Type	Assignment
Lead Selection	Status	Qualified
Schedule	Schedule Mode	Assignment is not automatic. You must run this activity on a repeating schedule to make sure that the leads are transferred to field sales as soon as they are qualified by inside sales. To run the activity regularly, select **Repeats**, enter a frequency (1 hour, for example), a start date, and an end date far into the future. You must enter both a start date and an end date for the process to run.

6. You can monitor the processes on the Manage Lead Processing Activities page. This page lists all of your processing activities.

Display List of Unaccepted Leads

Use these steps to create a saved search list of the leads you imported in the Leads work area. Inside sales representatives use the list to review incoming leads and accept the leads they want to work on. After sales representatives accept a lead, the lead displays among the leads they own and no longer appears on the list.

Saved searches store all of your search criteria, filters, and formatting of results for reuse. Use saved searches to create lists of information useful to you in each work area. For example, you can create a saved search for the leads you imported in the Leads work area. Inside sales representatives use the list to review incoming leads and accept the leads they want to work on. After sales representatives accept a lead, the lead displays among the leads they own and no longer appears on the list.

Your saved search saves whatever you added to your search, including keywords, filters, columns, and sort order of the results. You can create lists for the whole organization or lists targeted to specific job roles. Here's an overview of the steps:

1. Navigate to the Leads work area.
2. Click in the **Ask Oracle** bar and select **Manage Saved Searches**.
3. Click **Actions** (the three dots in the Actions column) and select **Edit**.
4. Modify the list to create a saved search for the leads you imported.
5. Click **Save**.

Verify Your Leads Setup

Test your leads setup. Sign in first as an inside sales representative to accept and qualify the lead. Then sign in as a field sales representative to convert the lead to an opportunity.

Sign In as an Inside Sales Representative

1. Sign in as one of the inside sales representatives and navigate to the Leads work area.
2. Select the list of unaccepted leads you created.

   The list should contain all your imported leads.
3. Open one of the leads and click **Accept**.

   You should now be listed as the lead owner.
4. Click the **Sales Team** tab to make sure all the appropriate sales representatives are listed.
5. Make sure that the information in the lead you're qualifying is sufficient to assign the lead to the field service representative you're using for testing.

   In our use case, qualified leads are assigned to sales territories by state. Make sure that the contact address in the lead includes one of the states in the US that belong to the territory of the field sales representative you're using for testing.
6. Click **Qualify** to indicate the lead is qualified.

Sign In as a Field Sales Representative

1. Ensure that the assignment process you scheduled previously has successfully completed. If you have not run the assignment process, then you must run the process again, this time, immediately.
2. Sign in as the field sales representative who owns the territory the qualified lead is assigned to.
3. Navigate to the Leads work area.
4. Select the **Open leads where I am on the team** list.
5. Edit the lead.
6. From the **Actions** menu, select **Convert**.

   The Convert window appears.
7. Optionally, change the opportunity name to something more meaningful.
8. Click **Submit**.
9. The opportunity work area view automatically opens in the current tab replacing the leads work area.
10. You can open the opportunity and view the created account and contact from there.

Update Leads with Most Recent Contact and Account Information

Schedule the process Update Leads with Most Recent Contact and Account Information to run periodically in order to make sure any changes to account and contact information are reflected in leads.

1. Open **Navigator** > **Tools** > **Scheduled Processes** .
2. On the Overview page, click **Schedule New Process** and click the **Search Name** button (down arrow) on the right side of the **Name** field.
3. Click the **Search** link at the bottom of the list.
4. In the dialog box, search for **Update Leads with Most Recent Contact and Account Information**.
5. Select the process and click **OK**
6. In the Process Details window, click **Advanced**.
7. Under Advanced Options, select **Schedule**.
8. Select **Using a schedule** and enter information about how often you want to update the lead information.

Related Topics

- What are scheduled processes?

Classic Sales Only

Create a Lead Qualification Template

You can use a lead qualification template to set up questionnaires that guide salespeople through the lead qualification process. You can set up multiple qualification templates, each for a different product.

1. Open the task **Manage Sales Lead Qualification Template** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Leads
    - Task: Manage Sales Lead Qualification Template
2. Click **Create** (the plus sign icon) to create a new template, or you can copy and modify the template provided by Oracle.

Enter Basic Template Details

Make these entries in the Enter Details page:

1. Enter a template name. For example: `Imported Web Leads`.
2. Select **Lead** as the **Template Type**.
3. For the **Template Set**, select **Common Set**.

   Sets make it possible for you to target different qualification templates for different business units, but the application covered in this guide uses only one business unit. For an explanation of how you can tailor your sales application for multiple business units, see the Implementation Reference guide.
4. Click **Next**.

Configure Ratings

Ratings group question responses in a template into different categories. There are three predefined ratings: Poor, Average, and Good. You can add your own ratings or modify the predefined ratings. When you're done, click **Next**.

Create Question Groups, Questions, and Responses

Create the question groups, which serve as headings in the template, and the questions within each group.

1. Click **Create** (the plus icon) and select **Create Question Group**.
2. Enter a name, which appears as the heading for this group of questions, and click **Save and Close**.
3. Now create your questions for this group. For each question:
    a. Click **Create** (the plus icon) and select **Create Question**.
    b. In the Create Question window, enter the question text.
    c. Enter a weight indicating how important this question is in the qualification process. You have a chance to revisit and adjust the weights to all the questions at a later stage.
    d. Click **Save and Close**.
4. Enter the possible responses for each question:
    a. Enter the response, score and rating.

       Here are the response entries for a yes or no question, for example: `Did you reach the contact by phone?`

Response	Score	Rating
Yes	100	Excellent
No	0	Poor

   b. When you complete entering your questions, you can reorder the questions by clicking **Move** (the double right arrow).
5. Click **Next**.

Edit Question Weights, Configure Score Ranges, and Associate Task Templates

Use these steps to edit the question weights, configure score ranges, and associate task templates:

1. On the Edit Question Weights page, the weights in the **Weights** column for each question until the total equals 100.
2. Click **Save** and then **Next**.
3. The application derives the score range for ratings using the scoring to response mapping in the questions and responses that you entered earlier. On the Configure Score Range Attributes page, you can select the **Override Score Ranges** option to edit the automatically derived score ranges. You can also set different start and end scores for the ratings. You can use the **Graph Color** list to change the colors shown in the various score ranges.

Deploy the Qualification Template

When you're ready to deploy the qualification template, do the following:

1. Click **Save**.
2. Click **Deploy**.
3. Click **OK** to close the confirmation window.

   The application displays any errors in setup. For example, if you did not enter question weights which total 100.

   > **Note:** After you deploy a template, you can't change its name or edit many other aspects. If you need to make changes, make changes in a copy, and then deploy the copy.

Select Default Lead Qualification Templates

To turn on lead qualification, you set the profile option Advanced Lead Qualification Enabled to the lead templates you want to use by default. You can specify one template for use for the whole sales organization, you can specify different templates for different products, and you can assign specific templates to different users. The settings aren't mutually exclusive. You can provide a default template for the whole organization, but target different template to individual users or product groups, for example.

1. Open the task **Manage Sales Lead Profile Options** from the Setup and Maintenance work area:
   - Offering: Sales
   - Functional Area: Leads
   - Task: Manage Sales Lead Profile Options
2. Enter `Advanced Lead Qualification Enabled` in the **Profile Display Name** field.
3. Click **Search**.
4. Select the profile option.
5. In the Profile Values section, click **New** (the plus sign).
6. If you're using only one template, then select **Site** from the **Profile Level** list. The options are:
   - **Site**

The same template is used for the entire organization unless you specify additional templates for product and user.

- **Product**

  The template is used for a product group. All other product groups are assigned the template you specify at the site level.

- **User**

  The template is used for the user you enter. All other users are assigned templates for the product or the site.

Select the name of the template from the **Profile Value** list.

7. Repeat the previous steps for additional products and users.
8. Click **Save and Close**.

Configure the Classic Sales Leads UI

Make Changes to the Lead Pages

If your sales organization handles large volumes of unqualified leads using the Classic Sales UI and you want to prevent your sales data from getting cluttered with unverified account and contact information, read on.

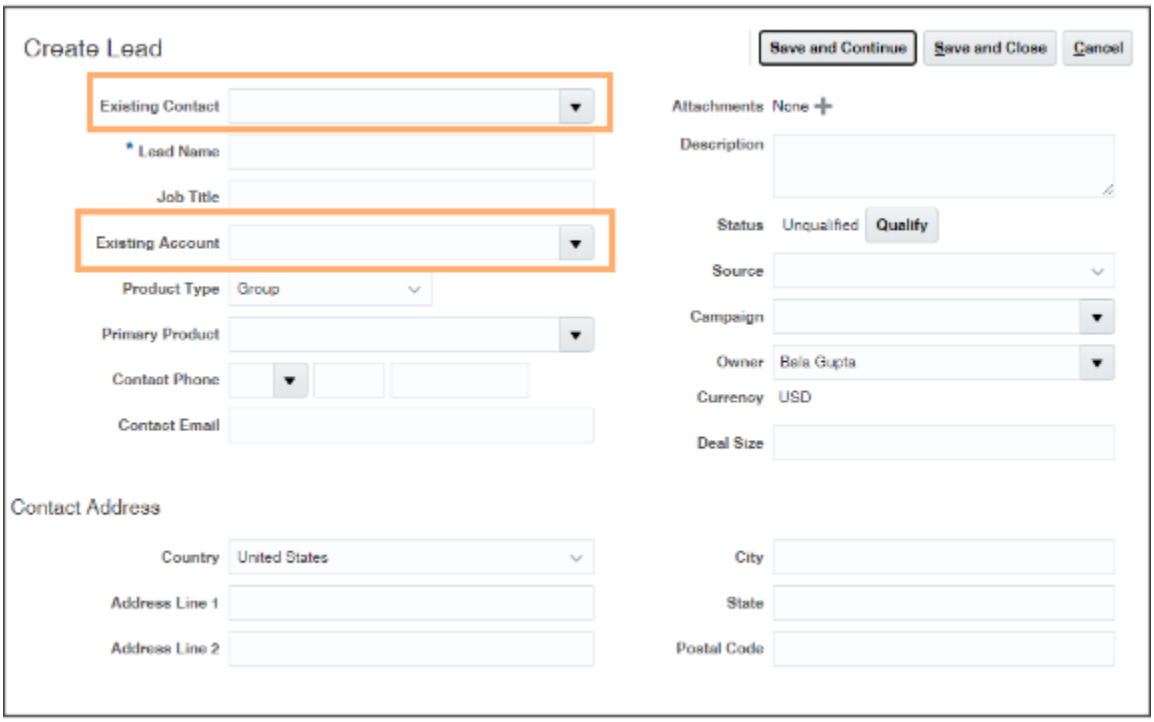
With a bit of setup, you can store account and contact names in the lead as text and create the account and contact records only after salespeople verify that the information is legitimate and accurate. If a lead doesn't pan out, the information just stays in the lead.

Lead Pages Handle Only Leads for Existing Accounts

Here's how the application act by default:

- When creating a lead in the Classic Sales UI, salespeople can only enter accounts and contacts that already exist in the application. If they want to create leads for completely new accounts and contacts, they must first create the appropriate account and contact records.
- If you import completely new leads, as you do using the import macro, the leads get imported, but the new accounts and new contacts names don't show up on the Edit page.

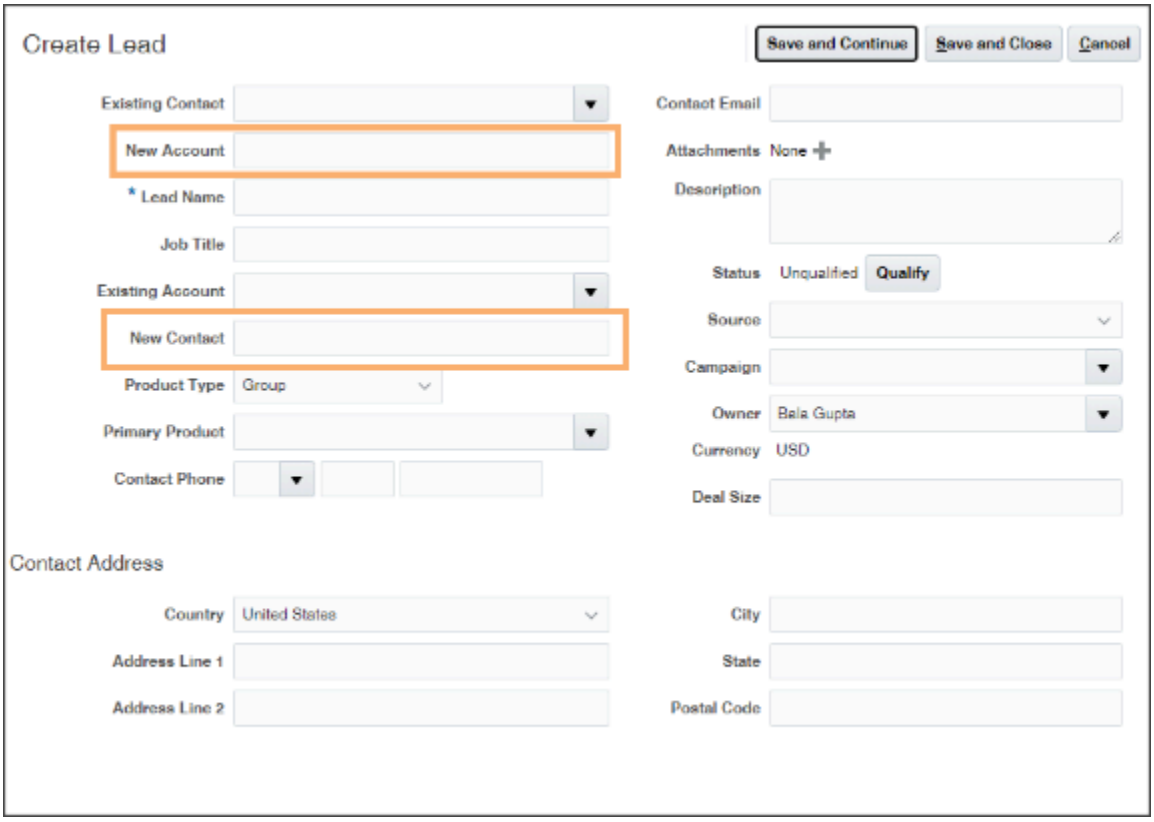
Here's what the default Create Lead page looks like from the Classic Sales UI. The screenshot highlights the **Existing Contact** and **Existing Account** fields.



Two Fields Enable Net New Leads in Classic Sales

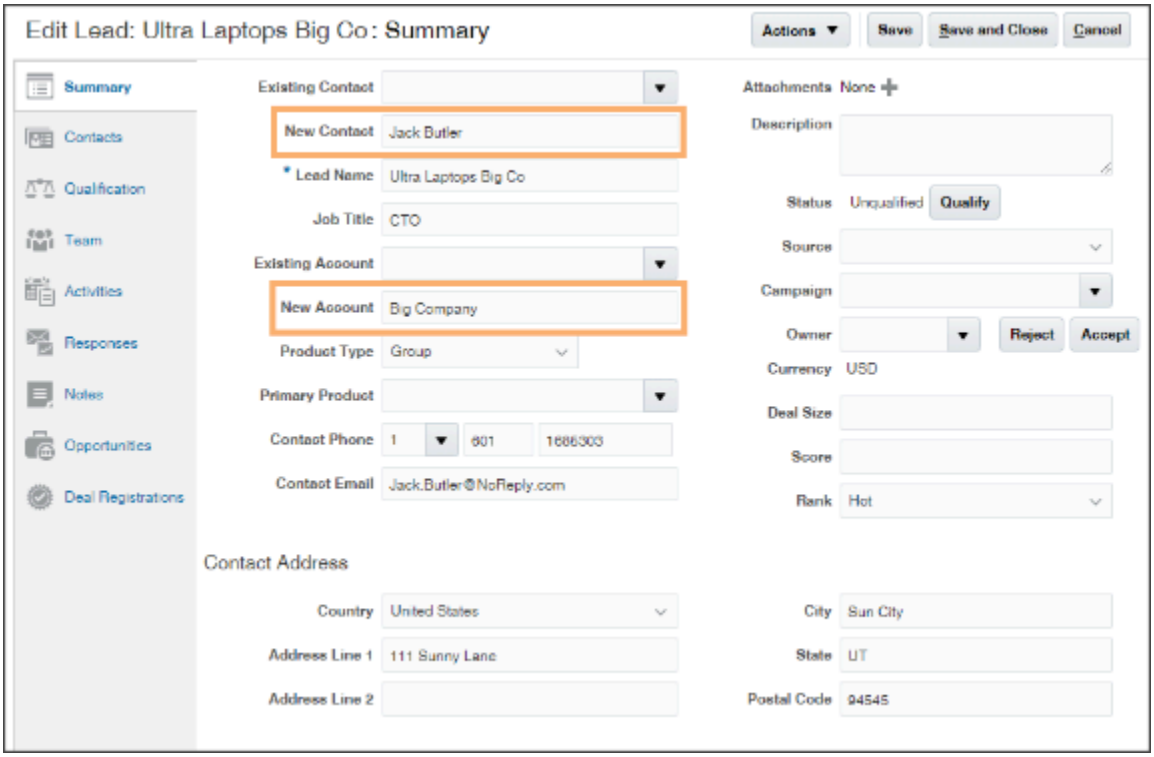
You enable salespeople to view and enter the account and contact names as text in net new leads by exposing the **New Account** and **New Contact** fields in the Classic Sales UI.

Here's a screenshot of the Create Lead page highlighting the fields in the Classic Sales UI.

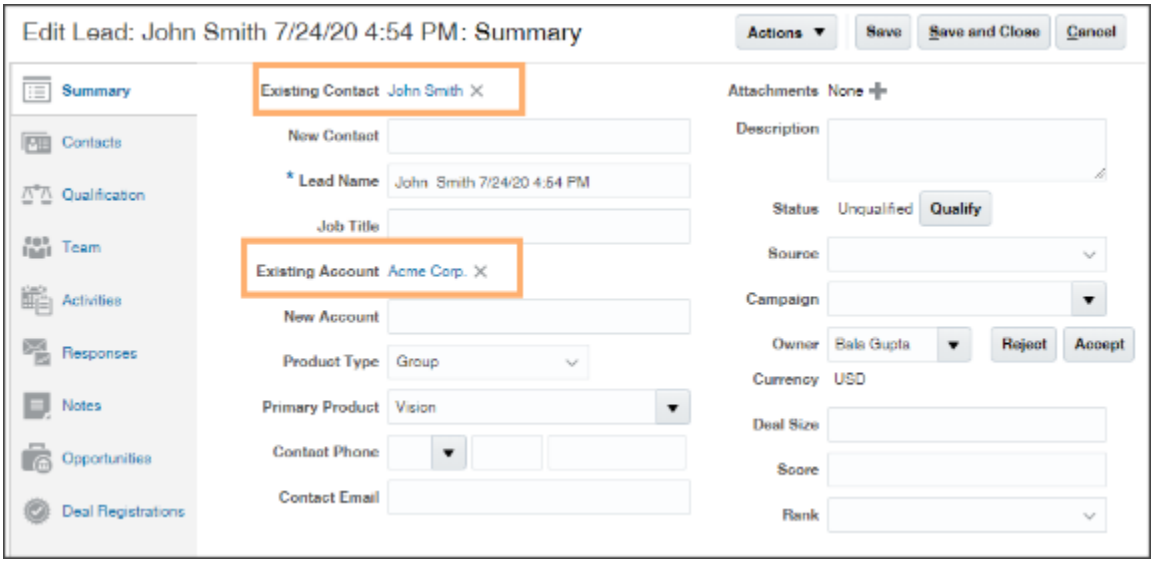


You must expose these same two fields in the Edit Lead page and other pages required for your leads process. These pages include the Leads landing page and the pages used to convert leads into opportunities.

Here's how salespeople see net new leads in the Edit Lead page from the Classic Sales UI.



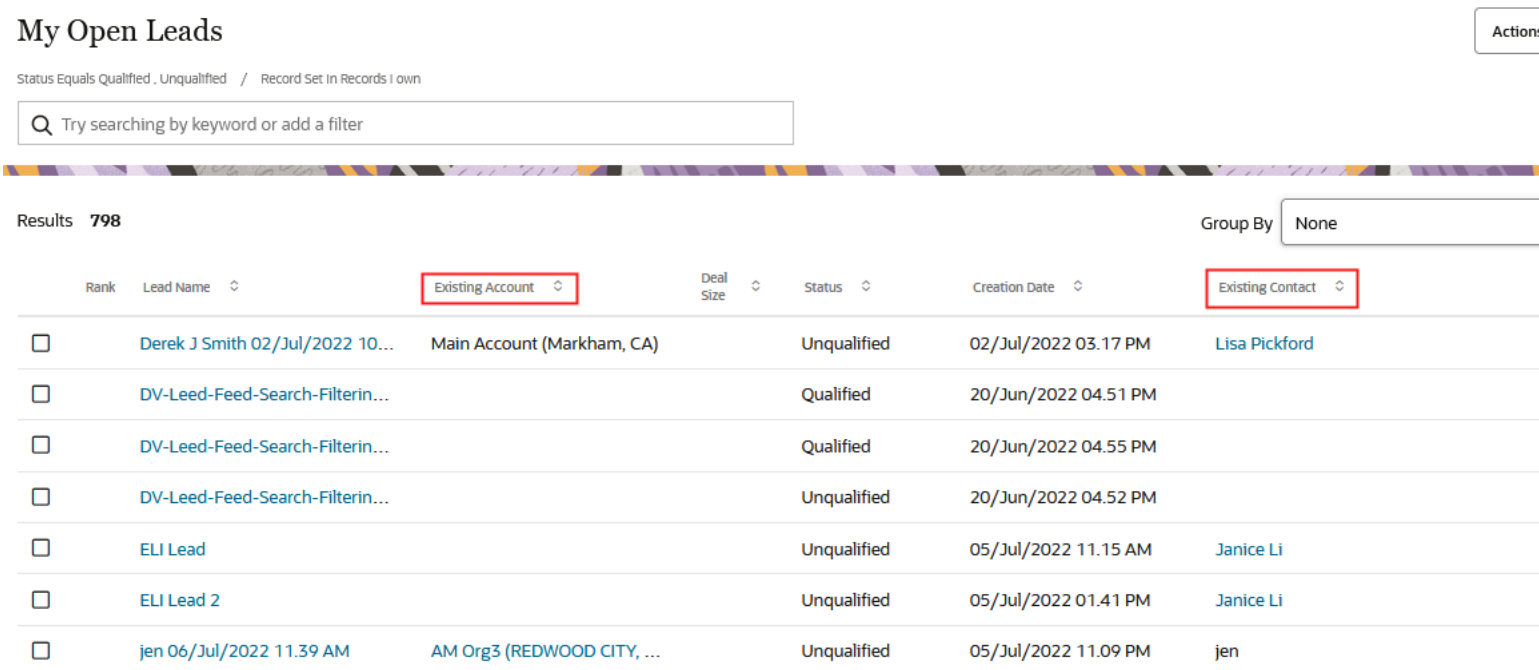
Leads for existing accounts, display the existing contacts and accounts as links:



No UI Changes Required in Sales for Redwood

In the Sales for Redwood UI, salespeople can enter accounts and contacts as text or select existing accounts and contracts in the same field, so no UI changes are required. The screenshot highlights the **Existing Account** and **Existing Contact** columns on the list page. Salespeople can enter an account or contact as text or select an existing record in these fields.

You can also use the **Account Name** and **Contact Name** fields for the same purpose. These fields are equivalent.



Add the New Account and New Contact Fields to the UI

You must add the New Account and New Contact fields to the leads pages that salespeople use to create and qualify net new leads.

You may want to add the two fields to these pages. The table gives the Classic Sales page names and lists the equivalent names in Application Composer.

UI Page Name	Application Composer Page Name	Comments
Leads	Landing Page	This is the landing page that opens when you navigate to the work area. Salespeople should see the New Account field displayed in the list of leads.
Create Lead	Creation Page	Add the fields to the create page if you want salespeople to create net new leads manually in the UI. If a salesperson comes back with a few business cards from a trade show, she may want to create leads individually.
Edit Lead	Details Page	This is the page that inside sales agents will use to verify the contact and account information, so you must expose both the fields. You must expose the fields here to display any net new leads you import using the lead import macro.
Convert Lead	Lead Convert Page	Converting a lead from a net new lead creates a new account, a new contact, and a new opportunity. Expose both fields so agents can see what they are converting.

UI Page Name	Application Composer Page Name	Comments
Convert Leads	Mass Lead Convert Page	Page you use to convert multiple leads at the same time using the Qualify action from the list page.

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

If you're adding the fields to Classic Sales UIs, follow these steps:

1. Create and activate a sandbox.
2. Create custom layouts for the appropriate pages and add the fields.
3. Review your work in the leads pages.
4. Publish the sandbox.

Create and Activate a Sandbox

To start customizing the Classic Sales UI, activate a sandbox.

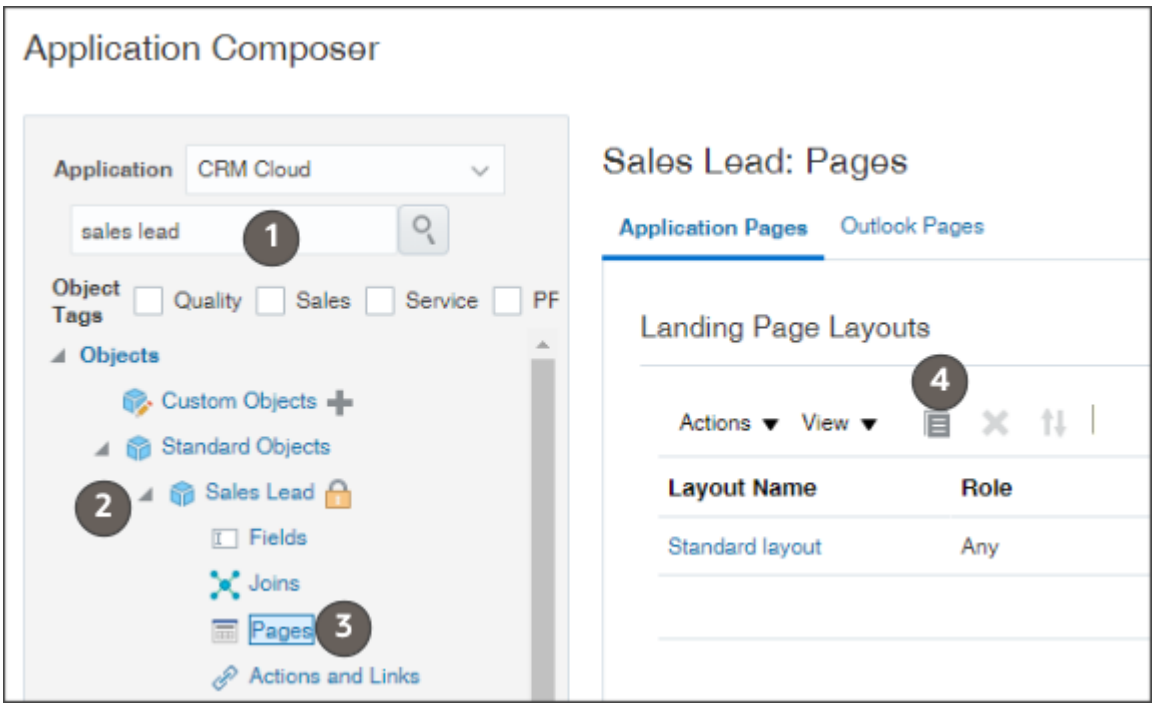
1. Click **Navigator** > **Configuration** > **Sandboxes**.
2. On the Sandboxes page, click **Create Sandbox**.
3. Enter a name for your sandbox.
4. In the All Tools section, select **Application Composer** as the tool you want to activate for this sandbox.
5. Click **Create and Enter** to create and enter the sandbox.

The application displays a bar at the top of the page with the sandbox name.

Add the New Account and New Contact Fields to the Classic Sales Lead UIs

1. In the Navigator, click **Application Composer** located under the **Configuration** heading.

2. In the left pane of the Application Composer page, search for the Sales Lead object (callout 1 in the screenshot).



3. Open the **Sales Lead** object (callout 2).
4. Click **Pages** (callout 3).
5. For each of the pages where you need to expose the fields, do the following:

    a. Locate the page.
    b. Click **Duplicate** (callout 4).
    c. In the Duplicate Layout window, enter a new name for your layout or just click **Save and Edit**.
    d. On the Layout page, click **Edit** (the pencil icon).
    e. Scroll down in the **Available Fields** column to locate the **New Account** and **New Contact** fields and move them to the **Selected Fields** column.
    f. Use the arrow buttons to move the fields where you want them.
    g. Click **Save and Close**.

    You're returned to the Layout page, which reflects your changes.
    h. Click **Done**.

    You're returned to the Application Composer page.

Test Your Changes

Here's how to test changes you made in Classic Sales pages:

1. Click **Home** (the icon located at the top of the page).
2. Navigate to the Leads work area by clicking **Sales** > **Leads**.
3. Check to see if the **New Account** field displays as a column on the list page.
4. Click **Create Lead**.
5. Enter a lead name only.
6. Click **Save and Continue**.

7. On the Edit Lead page, enter test data in the **New Account** and **New Contact** fields.
8. Click **Save**.
9. Click **Actions** > **Convert**.
10. On the Convert Lead page, click **Submit**.

    After the lead processing completes, the Edit Lead page displays the converted lead. The contact displays as a link in the Existing Contact field. And the account as a link in the Existing Account field.
11. You can drill down in the account and contact links to see that the account and contact records have been created for you. From the Opportunity tab on the lead, you can also drill down into the opportunity created from the lead.
12. If you need to make further changes, you can go back to Application Composer and edit the layouts again.

Publish Your Sandbox

After testing, publish your sandbox:

1. Click on the sandbox name in the sandbox toolbar and select **Publish**.
2. Click **OK** in the dialog box to navigate to the Sandbox Detail page.
3. In the Sandbox Detail page, click **Publish** again.
4. Click **Continue to Publish** in the warning message to confirm that you want to publish.

Add the Redirect to Opportunity After Conversion Checkbox

Sales administrators can add the Redirect to Opportunity After Conversion check box to the Convert Lead page so that users can choose whether to be redirected immediately to the opportunity page after the successful conversion.

This reduces the time spent going to the Opportunities subtab on the Lead and finding the right opportunity to open.

> **Note:** The redirect to opportunity feature is available for single lead conversions only. The check box is deselected by default and isn't available from the Mass Convert Layout Pages for Leads.

Use these steps to add the **Redirect to Opportunity After Conversion** check box to the Convert Lead page.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**, in the Configuration category.
4. In the navigation tree, expand **Standard Objects**, expand **Sales Lead**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. On the Application Pages tab, under the Lead Convert Page Layouts section, duplicate the standard layout to create a new layout to edit.
7. Type a new layout name and click **Save and Edit**.

   The Lead Convert Page Layout page appears.
8. Click the **Edit** icon next to **Lead Convert Page Layout**.
9. From the **Configure Detail Form** region, move the **Redirect to Opportunity After Conversion** field from the Available Fields area to the Selected Fields area.
10. Click **Save and Close**.
11. On the Edit Layout page, click **Done** and ensure that the layout status for your Lead Convert Page Layout is set to Active.
12. Verify that you can see the **Redirect to Opportunity After Conversion** check box on the Convert Leads page for a selected lead that you want to convert.
13. Publish your sandbox.

FAQs for Sales Leads

How can I provide Account team access to Leads?

A user with the IT Security Manager job role can provide access to the leads associated with an account team by creating a new data security policy for the Sales Lead database resource.

Using the security console, they can specify the access level such as view or update sales lead data, and then assign what role, such as Sales Representative or Sales Manager, to apply to the security policy. Finally, they must specify a condition for the new data security policy. For example,

```
Access the sales lead for table MKL_LM_LEADS where they are a member of the lead sales account team or in
 the management chain
 of a lead sales account team member.
```

For more information, see the Create a Data Security Policy for a Database Resource section in the topic Manage Database Resources topic of the Oracle CX Securing CX Sales and Fusion Service guide on Oracle Help Center (https://docs.oracle.com).

Related Topics

- Manage Database Resources

Can I update a lead number?

No. A lead number can't be updated after the lead record is created. The only option is to delete the existing lead and recreate it with the data you want.

How come I don't see products in leads or opportunities?

You must enable and publish products and product groups in Adaptive Search before you see them in the leads and opportunities UIs. You can do this either using Setup Assistant or using this procedure.

1. In Setup and Maintenance go to: **Sales offering** > **Sales Foundation functional area** > **Configure Adaptive Search task**.
2. Click the **Setup** tab.
3. Select **Product** and **Product Group** and any other object you want to enable.
4. From the Actions menu, select **Full Publish**.
5. You can monitor the progress of the publish process on the Monitor tab.

Related Topics

- Sales Products High-Level Setup Steps
- Overview of the Setup Assistant

How do I notify a lead owner by email when a lead is assigned to them?

You can create email notifications using the Routines feature. Routines is the fastest way of creating email notifications. It doesn't require any Groovy scripting, and automatically appends a link to the lead in the email.

The following steps apply mainly to Redwood User Experience (UX) users. However, Simplified UI users can also use these steps but note that some options on the Trigger page aren't available for Simplified UI users.

1. Open Application Composer outside a sandbox (**Navigator** > **Configuration** > **Application Composer**).
2. Click **Routines**.
3. Click **Create Routine**.
4. Click **Skip Templates**.
5. Enter a name and description. For example: Email Notification for New Lead Owner. Notify owner that a lead was assigned to them.
6. Select the object, in this case Sales Lead.
7. Click **Next**.
8. On the Trigger page:
    - Redwood UX users have the following options:
        - Hourly
        - Daily
        - Weekly
        - Monthly
        - Yearly
        - Record created
        - Record deleted
        - Attribute changed
    - Simplified UI users have the following options:
        - Hourly
        - Daily
        - Weekly
        - Monthly
        - Yearly

    > **Note:** For Simplified users, if the existing options don't suit your requirements, you can use Rules to specify a trigger when the routine should run. For example, you can create and apply certain rule conditions to Attribute Owner ID, or Last Update Date, or Status and so on to trigger and submit the routine.

9. For Redwood UX users, select **Attribute changed** and then select **Owner ID** from the list of attributes because you're sending the email after the owner is updated in the record.

    > **Note:** Redwood User Experience (UX) users will have access to more triggers to specify when the routine runs. For example, in addition to the defined recurring schedules, they can choose to run the routine as soon as an attribute is changed or when a record is created, updated, or deleted.

10. Click **Next**.
11. On the Actions page, select **Send Email** as the action type.
12. In the **To** field, select **Owner ID**.

13. In the **Subject** and **Body** fields, you can enter both text and mail-merge attributes. For example, to include the lead name, enter **Name** in the **Attribute** search box, press **Return**, and click **Lead Name**. Your action enters the mail-merge field `{{$Name}}`.

    > **Note:** The email sent to the new owner gets automatically appended with a link to open the lead.

14. Optionally, you can add another action. For example, in addition to sending the email you can create a task by selecting **Create Task** from the **Action Type** list and entering the task attributes.
15. Click **Next**.
16. In the Rules, page you can create rules and groups of rules that select the leads the notification runs on. In this example, we're notifying the owner when any lead is assigned to them, so you can skip this step.
17. Click **Next**.
18. On the Review page, review your entries and click **Submit**.

See *Overview of Routines* for more information about routines.

10 Competitors

About Sales Competitors

The sales organization can track and analyze the impact competitors are having on sales by recording the competitors in each opportunity. By default, the sales application requires salespeople to enter the primary competitor whenever they close an opportunity. Unless you changed that default, you must create the list of competitors to enable opportunity closing.

To create the list of competitors, you're only required to enter competitor names. However, you can track more details about each competitor in the Competitors work area. You can enter company details, including its line of business, and status.

The Opportunities tab automatically displays all of the opportunities where that competitor has been selected as the primary competitor. Access to the Competitors work area is restricted to users with the Sales Administrator job role. However, sales managers and others in the sales organization can access preconfigured reports to view the effects of the competitors entered in opportunities.

Setup Assistant and Competitors

You can create up to 15 competitors using Setup Assistant. For each competitor you can enter:

- Name and suffix
- Line of business
- Threat level
- Organization size

You must go to the Competitors work area in Sales to enter the other details.

Related Topics

- Overview of Sales Competitors
- Manage Sales Competitors

Review the List of Competitors and Create Additional Ones

Here's how to review the list of competitors you created using Setup Assistant, add more information, and create new ones. The names of the competitors you create are available for selection in opportunities in both Classic Sales and Sales for Redwood.

Here's how to create a competitor in the Classic Sales UI. Salespeople enter the names of competitors when they close opportunities in both Sales for Redwood and Classic Sales. However, detailed information about each competitor is available only in the Competitors work area in the Classic Sales UI.

1. Click **Navigator** > **Sales** > **Competitors**.
2. To create a new competitor:
    a. On the Review Competitors page, click **Create**.
    b. In the Create Competitor page, enter the competitor name in the **Organization Name** field.
    c. You can enter a suffix, such as `Ltd.` or `Co.`, in the **Name Suffix** field.

       The suffix is automatically appended to the name in the application.
    d. Select a threat level. Salespeople can use the threat level to filter their competitor searches.
    e. Optionally, enter additional information about the competitor.

       Any additional information you enter is only visible in the Competitors work area. Only the competitor name is visible while selecting competitors in opportunities.
    f. Click **Save and Edit**.
    g. The application checks to see if any other organizations are potential duplicates. If there are existing companies with a similar name, you can choose to edit one of these instead.
    h. You can enter additional competitor information on the Edit Competitor page.
3. To review or edit an existing competitor, click on the competitor name link.

Related Topics

- Manage Sales Competitors
- Enable Competitors in Opportunities
- View Competitor Information Outside Opportunities
- Associate Competitors with Opportunities
- Enable Competitors in Leads

11 Opportunities

Overview of Guided Sales Processes

You can guide salespeople through a structured sales process as they pursue an opportunity from the initial qualifying stage to closing the deal. In Classic Sales, you build the guided sales process exclusively as a sales method. In Sales for Redwood, sales methods provide the scaffolding for a much more full-featured process provided by orchestrations. Using sales methods in Classic Sales, you can provide only a single set of linear recommendations. Orchestrations in Sales for Redwood, by contrast, can have multiple branches to suggest different actions when a particular step in the sales process does or doesn't succeed.

Each opportunity must be associated to a sales method that takes the salesperson through a series of sales stages. For each sales stage, you can specify any of the following:

- Prepopulate the win probability for opportunities at that stage.

  If you're including opportunities in forecasts using win probability, then prepopulating a default win probability ensures that opportunities don't get left out by mistake.
- Specify which field entries are required

  For example, you may require salespeople to enter the close date or budget for opportunities that are about to close.

For Sales for Redwood, you suggest appropriate tasks, documents, and actions for each sales stage by creating orchestrations. At each sales stage, you specify what information the salesperson needs to provide and what actions they need to take to move the opportunity to the next sales stage. You can also provide automated steps that take actions behind the scenes to follow up when things don't go as planned. For example, you can automatically send a follow-up email if a customer doesn't respond when a salesperson contacts them. See the topic *Guide Salespeople Through Best Practices Using Orchestration* for more information.

Classic Sales doesn't include orchestrations, but, for each sales stage, you can specify any of the following:

- The tasks you want assigned
- Documents you want to provide as part of Sales Coach

  See the topic *Overview of Sales Methods, Sales Stages, and Sales Coach* in the Implementation Reference guide.
- Assessments

  See the topic *Overview of Assessments* in the Implementation Reference guide.

Oracle provides several predefined sales methods, which you can modify to your needs. These include:

- Accelerated Sales Process

  A sales process for deals that involve a single decision maker and short time frame.
- Standard Sales Process

  A sales process designed for longer sales cycles, where decisions are made by committee.

You can create multiple sales methods for different sales situations and products. By default, all opportunities use the sales method you specified as the default in the Configure Opportunities quick setup page. In Sales for Redwood,

salespeople get to choose one of the available sales methods when they create an opportunity. If you want to give salespeople the same option of choosing a sales method in Classic Sales opportunity pages, then you must use Application Composer to display the Sales Method field in the UI.

Setup Assistant and Opportunities

You use Setup Assistant to configure basic opportunity behavior, but you must still supply the details of the sales process you want the sales organization to follow.

What You Can Do in Setup Assistant

- Select the default sales method.
- Add, edit, or reorder sales stages.
- Specify if win or loss reasons are required when closing opportunities.
- Specify the default close date for opportunities.
  If salespeople don't enter a close date in an opportunity, the close date is set to the creation date plus the number you entered. The close date affects the way opportunities are forecast in the Classic Sales UI.

What You Must Complete Manually

- Create the content for the sales method that you selected.
  For example, for each sales stage in Classic Sales, you can suggest action items, make some entries required, and provide documents and assessments.
- Edit the list of opportunity statuses.
- Edit the list of win/loss reasons salespeople enter when closing opportunities.
- In Sales for Redwood, specify what information the salesperson needs to provide and what actions they need to take to move the opportunity to the next sales stage and to complete the sale. See *Guide Salespeople Through Best Practices Using Orchestration*.

Summary of Opportunity Setup

Configure opportunities to guide salespeople through a structured sales process that's appropriate to your business.

Here's a summary of the setup tasks covered in this chapter.

Step	Applies To	Description	Navigation	Where to Get More Details
1	Sales for Redwood and Classic Sales	You can review and change the default sales method and change the opportunity close behavior on the	**Setup and Maintenance** > **Sales** > **Opportunities** > **Quick Setup (gears icon)**	See the following topics in this chapter:

Step	Applies To	Description	Navigation	Where to Get More Details
		opportunity Quick Setup page. However, you must use the Manage Sales Methods and Sales Stages task to create new sales methods or properly configure the one you chose.	**Setup and Maintenance** > **Sales** > **Opportunities** > **Manage Sales Methods and Sales Stages**	• *What Opportunity Behavior You Can Configure and Where* • *Configure Basic Opportunity Behavior* • *Create and Edit Sales Methods and Stages*
2	Sales for Redwood and Classic Sales	Optionally, configure opportunity statuses.	**Setup and Maintenance** > **Sales** > **Opportunities** > **Manage Sales Methods and Sales Stages**	See the topic: *Modify Opportunity Statuses*
3	Sales for Redwood and Classic Sales	Optionally, configure the list of win/loss reasons salespeople enter when they close opportunities.	**Setup and Maintenance** > **Sales** > **Opportunities** > **Manage Set Enabled Lookups**	See the topic: *Modify the List of Reasons Opportunities Are Won or Lost*
4	Sales for Redwood and Classic Sales	You can enable further aggregations on custom opportunity fields and define the aggregation label. For example, for Deal Size, you might want to aggregate a custom revenue field or aggregate a different custom revenue field for an Expected Revenue aggregation.	**Setup and Maintenance** > **Sales** > **Configure Adaptive Search** > **Configure UI** > **Enable for Group By**	See the topic: *Enable Group By and Custom Aggregations for Opportunities*
5	Sales for Redwood only	Before salespeople can create recurring revenue schedules in Sales for Redwood, you must first enable the feature. You do this in Oracle Visual Builder Studio. You must then enable the Revenue Lines UI elements for Sales for Redwood.	In Sales for Redwood, navigate to the page that displays the area you want to extend. For example, navigate to an opportunity record and then click **View All Products** on the Products panel. **Redwood Sales** > **Opportunities** > **View All Products** Under the Settings and Actions menu, select **Edit Page in Visual Builder**. **Configuration** > **Structure** > **Revenue Lines**	See the topic: • *Enable Revenue Lines UI Element*

What Opportunity Behavior You Can Configure and Where

You can configure opportunities to support your specific sales process. For basic configuration, you can use either Setup Assistant or the Configure Opportunities quick setup page (the two are equivalent). You must use other tasks to make more substantial changes.

Here's an overview of default opportunity behavior for Sales for Redwood and Classic Sales UIs and some of the ways that you can change it.

Default Opportunity Behavior	Applies To	Changes You Can Make in Setup Assistant or in the Configure Opportunities Quick Setup Page	Additional Setup
Opportunities follow the Standard Sales Process sales method provided by Oracle.	Sales for Redwood and Classic Sales	Oracle provides two sales methods: • Standard Sales Process (the default) • Accelerated Sales Process You can select any one of these sales methods as the default and modify its sales stages. Or you can select a sales method that you created from scratch. In Setup Assistant or Quick Setup page, you can edit the sales method sales stage names and add your own stages. To enter or edit the stage details, you must use the Manage Sales Methods and Sales Stages task.	Use the Manage Sales Methods and Sales Stages task to populate the details of each sales stage, including: • What fields are required • The actions you want salespeople to take • The tasks you want assigned (Classic Sales Only) • Documents you want to provide as part of Sales Coach (Classic Sales Only) • Assessments (Classic Sales Only) • For the Sales for Redwood UI, you can suggest appropriate actions to each of the sales methods and sales stages you create using Sales Orchestration processes. See the topic: *Guide Salespeople Through Best Practices Using Orchestration*.
Salespeople are required to enter a win or loss reason for an opportunity when they close it.	Sales for Redwood and Classic Sales	You can make the entry of the win or loss reason optional. Your entry is the equivalent of setting the profile option Close Opportunity Win/Loss Reason Required.	You can modify the list of win and loss reasons. See the Modify the List of Win/Loss reasons topic for details.
Salespeople must also enter at least one competitor before closing opportunities.	Sales for Redwood and Classic Sales	You can make competitor entry optional. Your setting is the equivalent to setting the profile option Close Opportunity Competitor Required.	If you want salespeople to enter competitors, you must set them up as described in the Competitors chapter.

Default Opportunity Behavior	Applies To	Changes You Can Make in Setup Assistant or in the Configure Opportunities Quick Setup Page	Additional Setup
When a salesperson creates an opportunity, the application automatically sets the close date to 20 days after the creation date unless the salesperson enters a different date. The close date can affect opportunity forecasts.	Sales for Redwood and Classic Sales	You can change the default close date. Your entry is the equivalent to setting the Opportunity Close Date Default profile option.	By default, when the salesperson closes an opportunity, the close date is automatically updated to the actual date. You can retain the previous date, by setting the profile option Opportunity Close Date Retain on Closure to Yes.
A salesperson closes an opportunity by selecting one of the closed statuses: Won, Lost, or No Sale.	Sales for Redwood and Classic Sales	None	You can modify the list of opportunity statuses using the Manage Sales Status task. For more details, see the Modify Opportunity Statuses topic.

Configure Basic Opportunity Behavior

Here's how to select and modify a sales method for your opportunities and to change opportunity close requirements. If you're satisfied with the entries you made in Setup Assistant, you can skip this step.

1. Click **Quick Setup** (gears) icon for the **Opportunities** functional area in **Setup and Maintenance**:
    - Offering: Sales
    - Functional Area: Opportunities
    - Quick Setup
2. You can make these modifications to the sales method:
    - Select a different sales method from the **Default Sales Method** list.
    - Edit an existing sales stage name, description, or win probability.
    - Select a different phase and status for a sales stage.
    - Enter a new sales stage:
        i. Click **Add Row** (the plus sign icon).
        ii. Enter the sales stage information.
        iii. In the **Order** column, enter a decimal number to insert the new stage between new stages. For example, enter 1.5 to enter a stage between stage 1 and stage 2. To enter a sales stage at the beginning, enter a value smaller than 1, for example, 0.5 or 0.75.

        > **Note:** You shouldn't change the order of existing sales stages. An existing sales stage associated with the Won status should be the last stage in the sales stage order. The reason is if the status of your opportunity changes to Won, then the expected behavior for the sales stage in the sales method moves to the last number in the Order column.
3. Modify opportunity close behavior:

- Make the entry of the competitor and win or loss reason optional by selecting the **No** option for each.
- Enter a different number of days in the **Default Close Date in Days After Opportunity Creation** field.

  If salespeople don't enter a close date in an opportunity, the close date is set to the creation date plus the number you entered. The close date affects the way opportunities are forecast.

Manage Sales Methods and Stages

Use these steps to edit an existing sales method, including one of those predefined by Oracle, or to create a new sales method entirely.

Here's how to create and edit sales methods.

1. From Setup and Maintenance, open the task **Manage Sales Methods and Sales Stages**:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Sales Methods and Sales Stages
2. On the Manage Sales Methods page, edit a sales method by clicking its name or click **Create**.
3. Leave the default value of **Common Set** for the **Set** field. Other values apply for implementations that require different sales methods for different business units.
4. Enter a name for the sales method and an optional description. These entries aren't visible to salespeople by default, but can be made visible when you configure the UI.
5. To provide a default close date for opportunities when they're created, enter a number of days in **Close Window**.

   Create or edit the sales stages for the sales method as described in the following section.
6. Save your changes.

> **Note:**
> - The **Enable Revenue Line Set Capability** option is used only for multiple business unit implementations.
> - You can use the **Disable** option to remove any unused sales methods from use. You can't delete sales methods after you create them.

Create or Edit Sales Stages for Sales Methods

Here's how to create or edit sales stages for a sales method.

1. Edit a sales stage by clicking its name link or click **Create**.
2. Enter basic information about the sales stage, including predefined values for win probability and analytics reports:

Field	Description
Name	Stage name visible in the UI.
Phase	Select a classification of the sales stage.

Field	Description
(For Classic Sales only)	You can define the sales stage phases by using the Manage Sales Stage Phase Codes task from the Setup and Maintenance work area.
Description	Description visible in the UI.
Status	Use the status of **Open** for all stages representing opportunities that are still in progress.
Order	Enter a number for the order of this sales stage in the sales method.
Quota Factor	Enter any number in this field. This number is used only for legacy reports, but entry is required.
Disable	Select the Disable option to remove any unused sales stages from view. You must not disable sales stages after they're used in opportunities.
Win Probability	Enter a default win probability for opportunities in this stage.
Duration (For Classic Sales only)	The number of days this stage should last. When an opportunity is in a sales stage longer than the duration, the opportunity is considered stalled. Stalled opportunities appear on the Stalled Deals Infolet and underlying report.
Stalled Deal Limit	This field is no longer in use.

If you're including opportunities in forecasts using win probability, then prepopulating a default win probability ensures that opportunities don't get left out by mistake. For example, if you automatically forecast all opportunities with a 70 percent or greater win probability, then you can set up the following predefined win probabilities. Your setup ensures opportunities in the Agreement, Negotiation, and Closed stages are included in forecasts even if a salesperson forgets to manually enter a win probability.

Sales Stage	Win Probability
Qualification	10
Opportunity	20
Building Vision	30
Presentation	50
Agreement	70
Negotiation	90
Closed	100

Sales Stage	Win Probability

3. Add any fields that you want to make required for opportunities in the Additional Required Fields region.
4. For the Classic Sales UI, add any activity templates you have created in the Activity Templates region. The activity templates can automatically create tasks and appointments, which appear in the Activities tab of the Edit Opportunity page in the Classic Sales UI.
5. Save your changes.

What to do next

For the Sales for Redwood UI, you can suggest appropriate actions to each of the sales methods and sales stages you create using Orchestration. For more information, see the topic *Guide Salespeople Through Best Practices Using Orchestration*.

Clear Cache if New Values Don't Show Up in the UI

If you don't see a new value that you created for a list of values in the Sales for Redwood UI, try clearing your browser cache. For performance reasons, Sales for Redwood uses the browser cache to store data such as lists of values and dynamic choice lists. A process clears the cache automatically every hour.

For example, if you're adding a sales stage to a sales method, you won't see the new sales stage in the Sales for Redwood UI until the automatic process runs and clears the browser cache. You see the new sales stage in the Classic Sales UI immediately.

Modify Opportunity Statuses

The application comes with four predefined opportunity statuses: Lost, No Sale, Open, and Won. Follow these steps to add new statuses or modify the existing ones.

1. From the Setup and Maintenance work area open the **Manage Sales Status** task:
    - Offering: Sales
    - Functional Area: Opportunities
    - Show: All Tasks
    - Task: Manage Sales Status
2. Here's how to add a new status:
    a. Click **Add** (the plus sign icon).
    b. Enter a name without spaces in the **Status Code** field. The code doesn't display to users.
    c. Enter a display name in the **Status** field. This name displays in the opportunity pages in alphabetic order.
    d. Select the **Active** option.
    e. Select from one of the predefined values for **Status Category**.
3. You can modify an existing status by selecting its row.
4. Save your changes.

Modify the List of Reasons Opportunities Are Won or Lost

When they close an opportunity, salespeople enter the reasons why the opportunity was won or lost. The application comes with a predefined list that you can modify to suit your business:

- Customer not ready
- Good lead
- Install base
- Lost to competition
- Lost to internal development
- Lost to no decision
- No bandwidth
- No budget
- Other
- Price
- Product
- Relationship
- Track record

Use these steps to modify the reasons:

1. Open the task **Manage Set Enabled Lookups** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Opportunities
    - Task: Manage Set Enabled Lookups
2. On the Manage Set Enabled Lookups page, **Lookup Type** field, enter `MOO_SETID_WIN_LOSS_REASON`.
3. Click **Search**.
4. Here's how you can add a new reason in the Lookup Codes section:
    a. Click **Add** (the plus sign icon).
    b. Enter an internal name in the **Lookup Code** field. No spaces permitted.
    c. Select **Common Set** from the **Reference Data Set** list.
    d. Select **Enabled**.
    e. Optionally, enter a start and end date.
    f. Enter the wording salespeople see as they close an opportunity in the **Meaning** field.
5. You can modify an existing win/loss reason by selecting its row.
6. Save your changes.

Enable Group By and Custom Aggregations for Opportunities

Additional predefined fields are now available for Group By and Aggregations for opportunities.

Previously, salespeople could group opportunities by Quarter, Month, and Sales Stage, and aggregate opportunity records by Opportunity Count and Revenue Amount fields. With Sales for Redwood, they now have access to other group-by options including group ranges and values. You can also enable the group-by feature on any supported opportunity fields including custom fields and configure aggregations to display predefined enabled aggregated fields in the opportunity pipeline list.

For example, a salesperson might want to group opportunities by a custom Invoice Date field that isn't based on the predefined Close Date field or they might want to group by Deal Size with specified defined ranges. You can enable further aggregations on custom fields and define the aggregation label. For example, for Deal Size, you might want to aggregate a custom revenue field or aggregate a different custom revenue field for an Expected Revenue aggregation.

Manage Opportunity Group By Field

Predefined fields are available for Opportunities for display as filters for your Group By search in Workspace, but you can specify field values for display as a filter in your Group By search by going to the **Configure Adaptive Search** > **Configure UI** > **Enable for Group By**.

This list contains the standard predefined configuration for opportunity group by fields.

- Sales Stage
- Win Probability (PrimaryRevenue.WinProb)
- Month - on close date (EffectiveDate)
- Quarter - on close date
- Account (CustomerAccount)

See the related topics, Set Up Search Results in Groups, and Supported Objects and Predefined Fields for Group By from the Adaptive Search and Workspace chapter of the Implementation Reference guide for more information.

Enable Revenue Lines UI Element

The Revenue Lines UI element isn't displayed as part of the Sales for Redwood predefined object configuration. Use the Structure page to enable the UI elements for the revenue lines object.

Revenue lines let salespeople view which products are being sold and how much credit they receive.

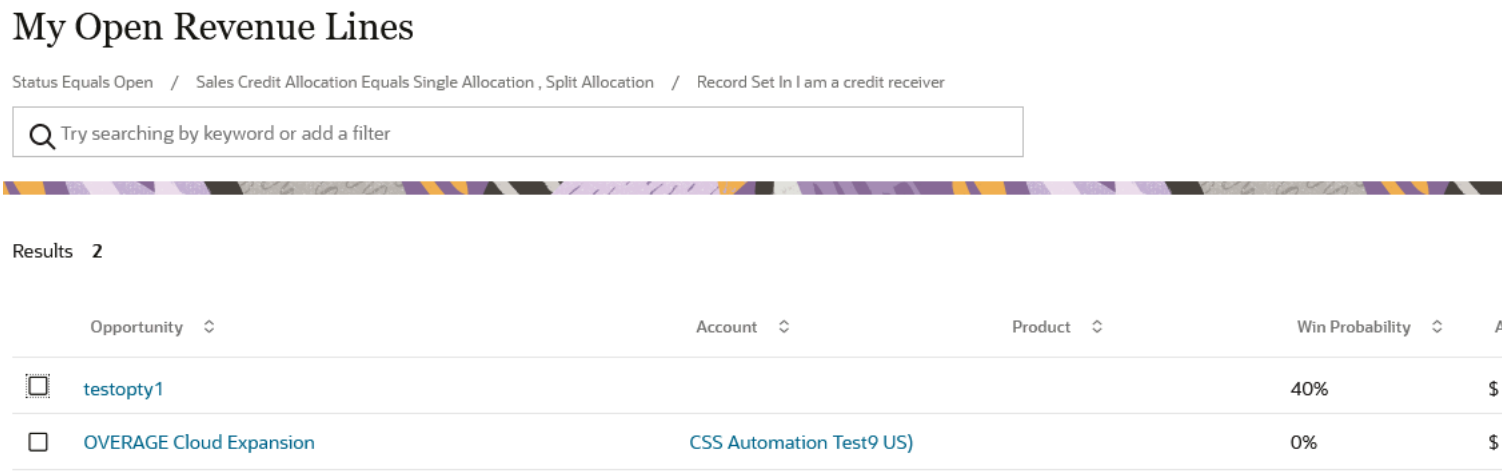
When configured, they can click the revenue lines icon under Redwood Sales in the Navigator or springboard to launch the Revenue Lines landing page. The Revenue Lines UI elements include:

- Revenue Lines icon on the springboard
- Revenue Lines link in the Navigator

- Revenue Lines landing page

Enable the Revenue Lines UI elements for Sales for Redwood as follows:

1. Sign in as the sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Configuration** > **Structure**.
4. In the Navigation Configuration page, select **Revenue Lines** under the Redwood Sales section.
5. In the Edit Page Entry: Revenue Lines page, select **Yes** for the Show on Navigator and Show on Springboard options.
6. Click **Save and Close**.
7. Publish the sandbox.
8. Verify that the Revenue Lines item is visible under the Redwood Sales group and that you can view the Revenue Lines landing page.



Related Topics

- Get Started with Configuring Navigation
- Create and Edit Groups

Enable Credit Receiver Record Set Values

You can enable credit receiver related values that appear in the opportunity search filter record sets. From the Setup and Maintenance work area, go to the Manage Standard Lookups and you can set the lookup types from the ORA_MOO_OPTY_SRCH_RS_WS: Lookup Codes page.

Prerequisites

Keep in mind the following prerequisites when salespeople assign sales credits in opportunities:

- Territories have been set up and your company is using territories for assignment of opportunity products.
- The user must have Full access to the opportunity to assign sales credits.

The record set called **I or my subordinate am a credit receiver** returns records where the signed in resource or their subordinate is a credit receiver for the opportunity. This allows sales managers and sales VPs to view the revenue lines for their entire team and see who is receiving credit.

The **I am a credit receiver** record set returns records where the signed in resource is a credit receiver for the opportunity. These record sets are predefined but they must be enabled before your salespeople can use them in Sales for Redwood.

> **Note:** Record sets involving subordinates, which are resources within an organization or a line manager's hierarchy, are available only to managers.

Here are the steps to enable **I am a credit receiver** and **I or my subordinate am a credit receiver** values for the opportunity search filter record set.

1. Navigate to the Setup and Maintenance work area, and use the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Standard Lookups
2. In the **Meaning** field, enter `Opportunity Filter Record Sets for Workspace.`
3. Click **Search**.
4. Select the lookup type you want to enable in the ORA_MOO_OPTY_SRCH_RS_WS: Lookup Codes page.
    - Scroll to the ORA_CREDITRECEIVER_ISME (I am a credit receiver) lookup code and select **Enabled**.
    - Scroll to the ORA_CREDITRECEIVER_MYORG (I or my subordinate am a credit receiver) lookup code and select **Enabled**.
5. Click **Save and Close**.

12 Sales Quotas

Overview of Sales Quota Setup

Quotas are targets salespeople strive to reach. Set up this feature to simplify assigning quotas to salespeople and to track their progress. This chapter covers the basic setup for quota management using the UI. It doesn't cover quota import or advanced quota calculation features. Quotas functionality is available only in the Classic Sales UI.

Here are the setup steps.

Step	Applies To	Description	Navigation	Where to Get More Details
1	Classic Sales	You previously set up sales territories. Each salesperson eligible to receive a quota must be assigned to an active territory. Quota calculations rely on territory coverage. If you plan to use quota calculations, then make sure that territories have dimensional coverage defined.	**Navigator** > **Sales** > **Territories**	See the Sales Territories and Assignment chapter.
2	Classic Sales	Seasonality applies percentages to split a quota over months or quarters to factor in seasonal fluctuations. Seasonality factor groups can be associated with quota plans or specific territories to account for variations in sales seasonality among different territories. Instead of entering quotas for each period of the year, you rely instead on seasonality to split your annual quota into period quotas. This task is optional.	**Setup and Maintenance** > **Sales** > **Quotas** > **Manage Sales Quota Seasonality Groups**	See the topic: *Set Up Sales Quotas*
3	Classic Sales	The sales revenue goal is predefined for revenue quotas. You can add other types of goals, such as volume. This is optional.	**Navigator** > **Quotas** > **Tasks (the side panel)** > **Manage Sales Goals**	See the topic *Sales Goals* in the Implementation Reference guide
4	Classic Sales	Create a sales quota plan for your fiscal year. One plan per fiscal year is required for tracking quotas	**Setup and Maintenance** > **Sales** > **Quotas** > **Manage Sales Quota Plans**	See the topic: *Set Up Sales Quotas*

Step	Applies To	Description	Navigation	Where to Get More Details
		for the entire territory hierarchy. The plan must be activated before you can allocate sales quotas.		
5	Classic Sales	Allocate sales quotas starting from the root territory down the sales territory hierarchy.	**Navigator** > **Sales** > **Quotas**	See the topic: *Set Up Sales Quotas*

Set Up Sales Quotas

Your sales organization sets sales quotas starting at the top of the territory hierarchy. Quotas pass down through the hierarchy to territories and the owners.

You create a sales quota plan to track the quotas for a year. Seasonality factors automatically split yearly quota into period quotas according to known seasonal fluctuations.

Create a Sales Quota Plan

This sales quota plan uses seasonality, which isn't required.

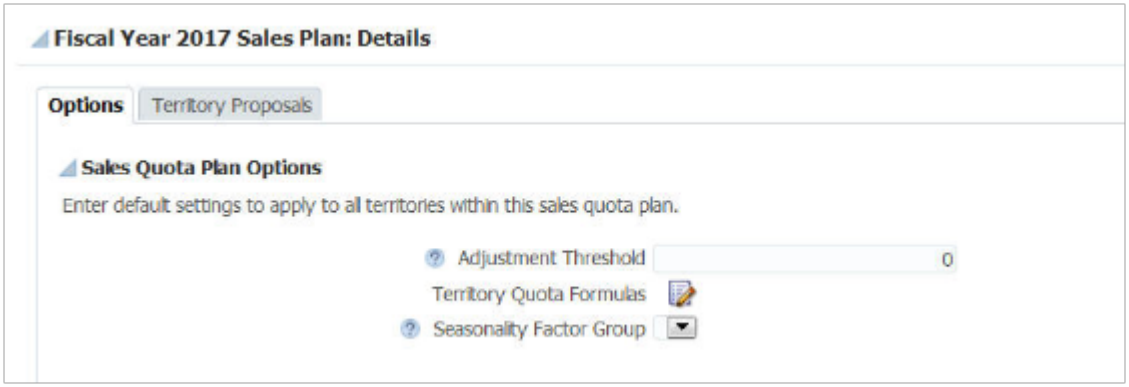
1. Open the **Manage Sales Quota Seasonality Groups** task from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Quotas
    - Task: Manage Sales Quota Seasonality Groups
2. Create a new group.
3. In the Seasonality Factors region, enter the factor percentages for time periods. Percentages must add up to 100.
4. Click **Save and Close**.
5. Open the **Manage Sales Quota Plans** task from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Quotas
    - Task: Manage Sales Quota Plans
6. Click **Create**.
7. Enter information for your new sales quota plan.

Field	Value
Calculate Default Territory Quota	Deselect. If selected, the application calculates the quotas for each of the territories using the default territory quota formula.
Track	Select. Only one plan can track quotas for the year.

Field	Value
Copy Quotas From	Leave Blank. After creating your first sales quota plan, copy a previous plan for a quick way to create a new plan.

8. Click **Save and Close**.
9. On the Options tab, select the name of your seasonality factor group.

   Here's the Options tab.



10. Click **Save**.
11. With your new quota plan selected in the list of plans, click the **Activate** button.
12. Set the activation to right now plus a few minutes in the future.
13. Click **OK**.

    The initial status is Pending Activation. Refresh the page to verify that the status changed to Active.
14. A sales revenue goal is automatically assigned to every territory owner during the annual quota planning process. Upon activation, sales managers can sign in to the application and begin allocating revenue quotas to their teams. Click Synchronize if you suspect the territory hierarchy for quotas isn't current.

Allocate Sales Quotas

Use the following steps to allocate sales quotas to territories. Allocate quotas to each territory from the top of the territory hierarchy down. You can allocate a quota to a territory only after you allocate the quotas for all the territories higher in the territory hierarchy.

1. Navigate to Quotas.
2. Select your activated quota plan.
3. In the Edit Sales Quotas region, verify that the territory quotas and owners' quotas are zero.
4. Select the root territory in the hierarchy.
5. Enter a territory quota amount and a resource quota amount for the year for the whole organization.
6. Click **Publish** and verify that the status changed from Not Published to Published.
7. For each child territory of the root territory, enter a territory quota amount and an owner's quota amount.
8. Select the parent territory and click **Details** for the territory.

   The Details table shows the rollup quotas total for the child territories and the variance from the parent quota.
9. Click **Save**.

10. Click the Territory Quota tab and verify that as part of the publish process, seasonality was automatically applied to split the annual quota into period quotas.
11. In the Manage Sales Quotas page, select a child territory of the root territory and click **Publish**.

    Note: If the Publish button is disabled, this could be the result of one of the following:
    - You did not publish the parent territory.
    - You don't own the parent territory.
    - The territory was already published. You can't republish a territory at the bottom of the hierarchy.

12. Verify that the status is Published.

    The application notifies the territory owner and the analyst that the territory was published.
13. Click **Save**.

    The following table lists common publishing errors and their solutions.

Error	Steps to Resolve
You can't publish quota for the territory because the territory has revenue quota assigned prior to the territory quota start date.	a. Select the parent territory. b. Click **Details** to navigate to the Edit Sales Quotas page. c. Select the territory. d. Select the Territory Quota tab. e. Set the period quota to zero for any period prior to the territory quota start date.
The total quota of all quarters for the territory doesn't equal the annual quota.	a. Select the parent territory. b. Click **Details** to navigate to the Edit Sales Quotas page. c. Select the territory. d. Select the Territory Quota tab. e. Update the period quotas so their sum equals the territory quota.
You can't perform this action for the selected record.	This error occurs when you attempt to publish a quota for a territory that you own. Only administrators and owners of parent territories can publish quotas for this territory.

Schedule Quota Processes

Sales managers or administrators frequently make changes to active territories directly, using territory proposals, or through web services. Schedule synchronization to run frequently to provide the latest structure for allocating quotas.

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
2. Click **Schedule New Process**.
3. For the Type field, select **Job**.
4. In the name field list, click **Search**.
5. Search for **Synchronize Quotas**.
6. Select Synchronize Quotas and click **OK**.

7. In the Parameters region of the Process Details page, select the sales quota plan.
8. Click **Advanced**.
9. In the Schedule tab, select **Using a schedule**.
10. Select the **Daily** frequency.
11. Change the start date to when you want to start running the process, and select the time of day when you want it to run.
12. Change the end date to a future date.
13. Use the Notification tab to add notifications to specific people when the process completes.
14. Click **Submit**.

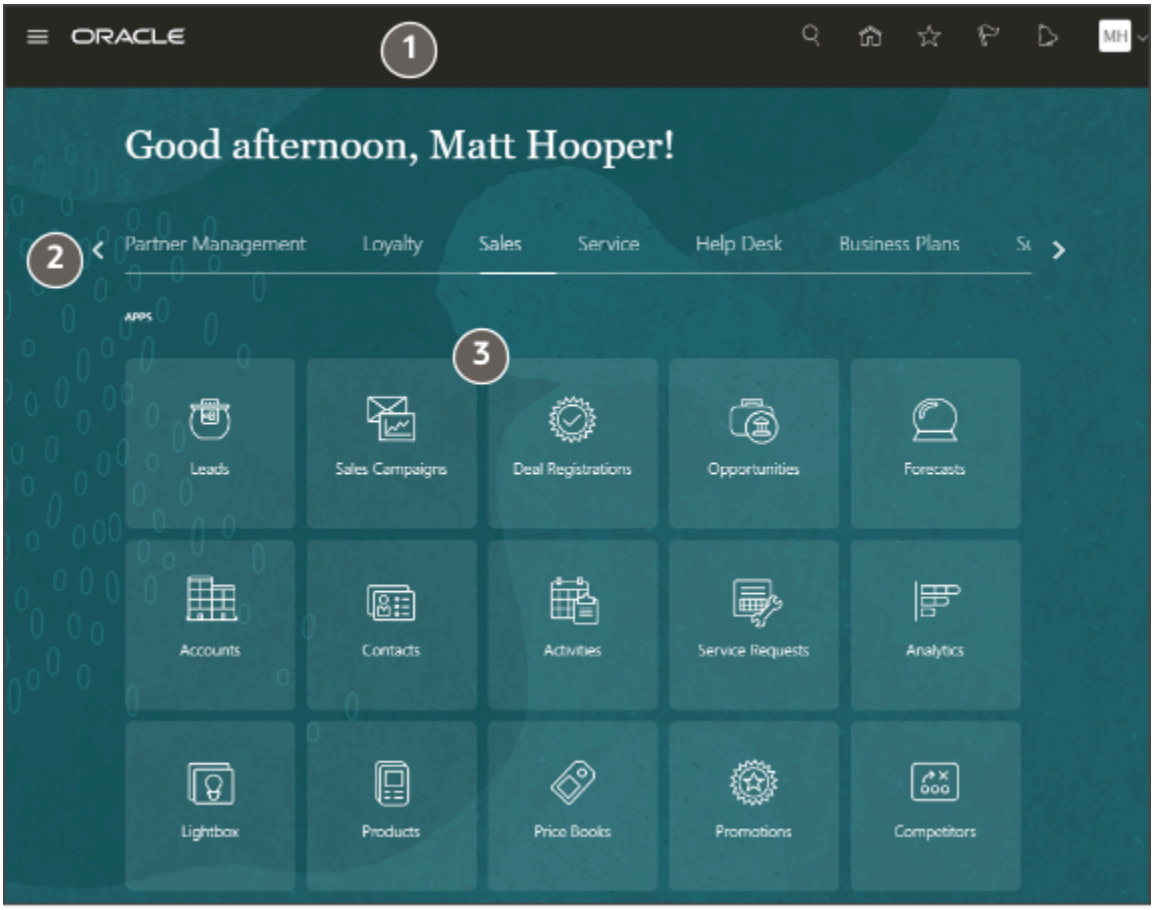
13 Configure the Navigator and Home Page

A Single Page for All Your Sales Activities

In the default home page design provided by Oracle, salespeople can access both the different work areas they need as well as the reports and analytics that highlight key sales information. Here's a brief description of the home page sections. You can configure the different sections and even hide some, but you can't change their order on the page. The home page is shared both by Sales for Redwood and Classic Sales.

Global Toolbar and Springboard with Navigation Icons

Callout Number	Region	Description
1	Global region with toolbar.	The toolbar includes icons to open the Navigator, Home page, and the Settings and Actions menu, among others. The toolbar, described in a separate topic, is available on all pages.
2	Tabs that group navigation icons.	Which tabs users see depends primarily on their security privileges. Because setup users have broad privileges, you see many more tabs than sales users. For example, sales users never see the Service or Help Desk tabs, as these aren't part of Classic Sales or Sales for Redwood. Sign in as a Sales Representative or a Sales Manager to get an idea of how the application is set up by default for each user. Using the Structure tool, you can rename the tabs, hide them, change heir order, and move their contents. The tabs correspond to the groupings you see in the Navigator, but you can choose to display only a subset of what's available in the Navigator.
3	Navigation icons within the tab you selected. This region is called the springboard.	Navigation icons within the tab you selected. The navigation icons correspond to the selections you see in the Navigator.



Things to Finish and News

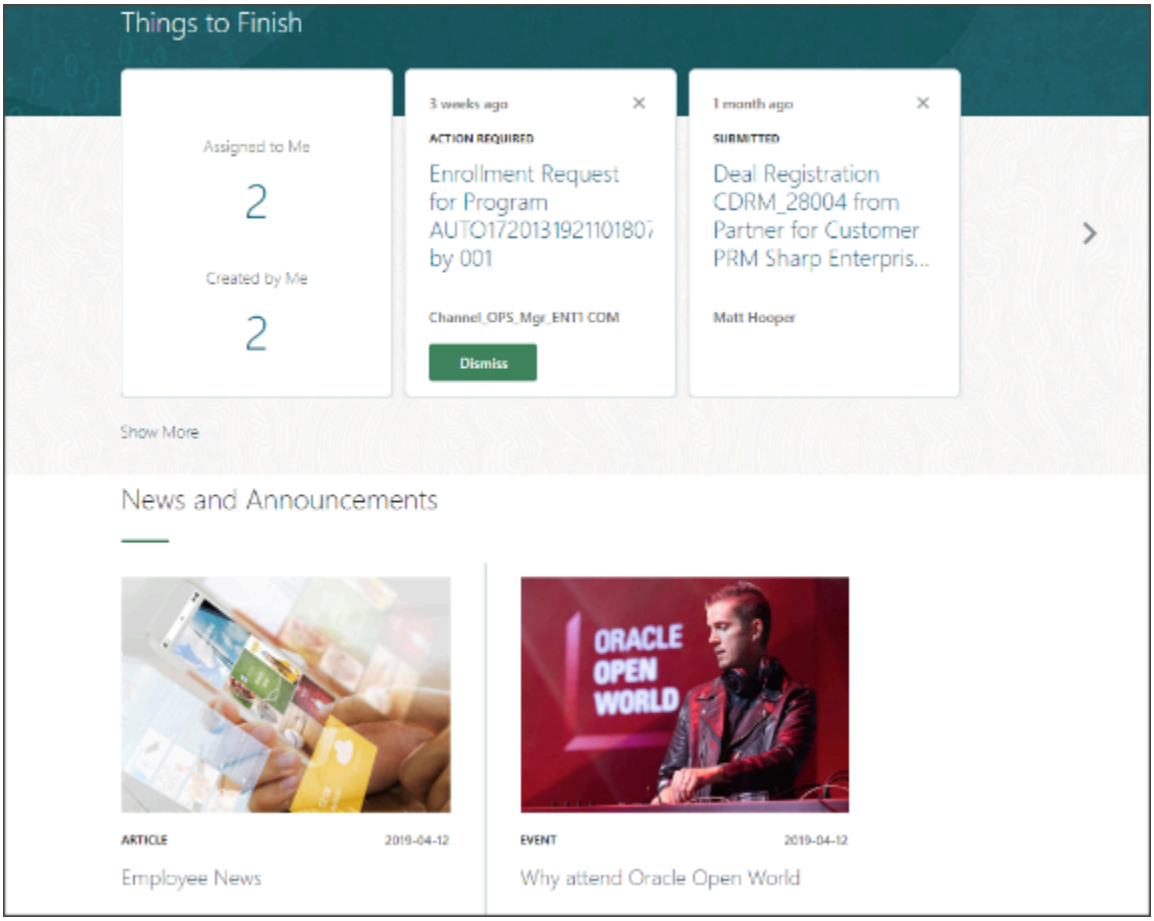
The middle of the page includes two regions that you can hide during setup:

- Things to Finish

  Displays the same notifications you can view using **Notifications** (bell icon) in the global toolbar.

- News and Announcements

  You can create company-wide announcements as described in the topic Create and Enable an Announcement in the Oracle Applications Cloud Implementing Applications guide.



Analytics and Key Classic Sales Information Displayed in Infolets

The Analytics section displays tabs grouping infolets. Infolets are containers that display key sales information in Classic Sales. In Sales for Redwood you display the information in the Sales Dashboard instead.

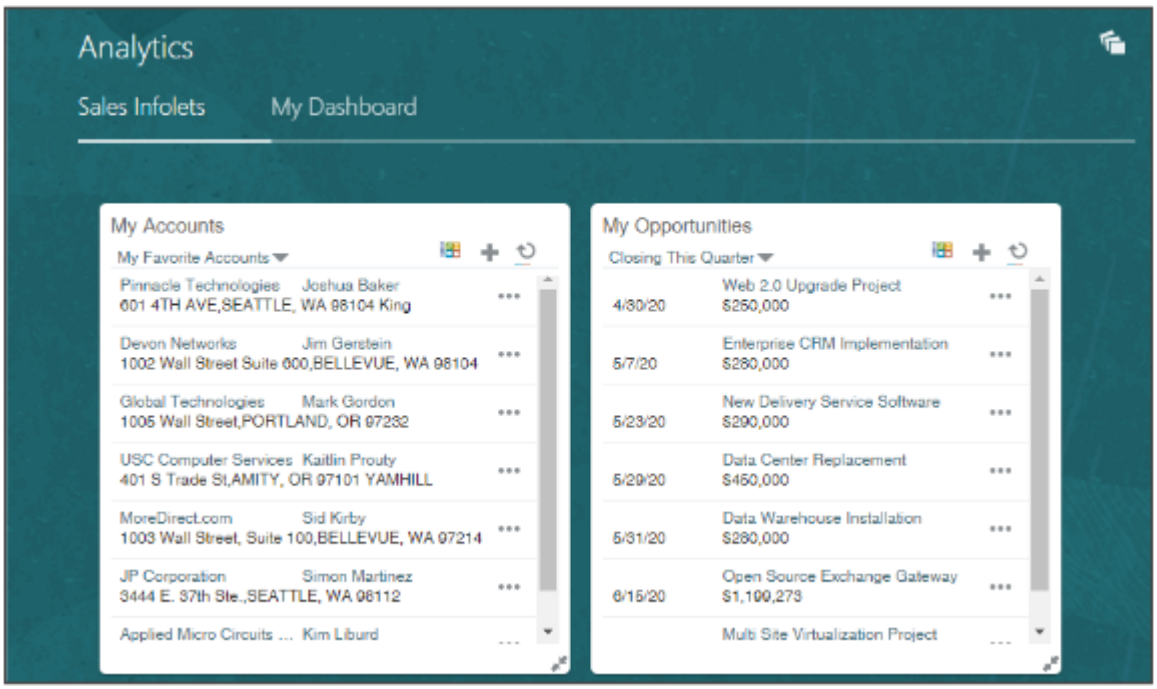
You can display different infolets for different job roles in the organizations and salespeople can configure what information they want to see on their own page.

There are two types of infolets you can display:

- Infolets with business intelligence reports provided by Oracle or those you create in Oracle Business Intelligence Answers (BI).

- Workspace infolets that summarize sales information and make it possible to take action on individual items without drilling down into individual records.

  Here's a screenshot of the Sales Infolets tab displaying two Workspace infolets.



> **Note:** By default, your application displays an older type of infolet, called actionable infolet, rather than the Workspace infolets. As described in this chapter, new customers should switch to using Workspace infolets because they're designed to work with Workspace. Actionable infolets are designed to work with individual work areas and the saved searches created in them.

Related Topics

- Workspace Infolets on the Classic Sales Home Page

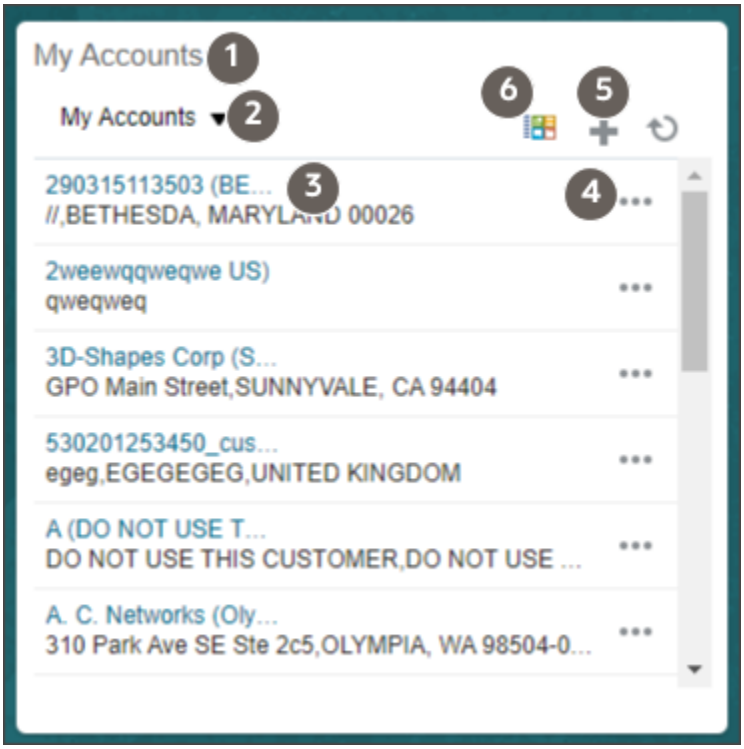
Workspace Infolets on the Classic Sales Home Page

In Classic Sales, Workspace infolets summarize key sales information in the Sales Infolet tab in the Analytics section at the bottom of the home page. They provide salespeople with many of the features they use in Workspace, such as quick actions and filters.

For example, from within the My Accounts Workspace infolet, salespeople can take notes, log calls, schedule appointments, and even create opportunities for a specific account in the list. They can also create accounts directly from the infolet. Here's a screenshot of the My Accounts infolet provided by Oracle:

Callout Number	Function	What You Can Configure
1	Infolet title.	Edit the title.

Callout Number	Function	What You Can Configure
2	Select a Workspace saved search as a filter.	Specify which Workspace saved searches are available as filters.
3	Review basic information about accounts and drill down to edit	You can specify which fields display in each record in the list.
4	Take actions on an account without drilling down. On an account, you can take notes, log calls, and even create opportunities.	You can enable, disable, or reorder the smart actions using Application Composer.
5	Create new accounts.	N/A
6	Navigate to Workspace.	N/A



Oracle provides you with 10 Workspace infolets. Six are preconfigured and four blank:

- My Accounts
- My Appointments
- My Contacts
- My Leads
- My Opportunities
- My Tasks

- Additional Actionable Infolet
- Additional Actionable Infolet
- Additional Actionable Infolet
- Additional Actionable Infolet

As a sales administrator or setup user, you can configure the information in each of the infolets, even those that are preconfigured. You can specify which Workspace saved searches are available as filters, change the infolet title, and decide how you want the infolet information to display. You can configure Workspace infolets to display any combination of saved searches from Workspace. Suppose, for example, that you created a project custom object to track projects involving multiple customers. You could configure one of the Workspace infolets as My Projects to track the accounts and the tasks involved.

Setup Overview

Here's an overview of the steps to configure your home page and navigation to application features.

Home Page

Here's a summary of the steps to configure your home page appearance. The home page is shared by both Classic Sales and Sales for Redwood.

Step	Applies To	Description	Navigation	Where to Get More Details
1	Both Classic Sales and Sales for Redwood	Create a sandbox with the Appearance tool.	**Configuration** > **Sandboxes**	See the video and topic: *Configure Home Page Appearance*
2	Both Classic Sales and Sales for Redwood	Upload your company logo and save your new configuration.	In the sandbox, select **Tools** > **Appearance**	Covered in the same video and topic. For additional configuration options, see the Configuration of Home Page and Navigation chapter of the Oracle Applications Cloud Configuring and Extending Applications guide.
3	Both Classic Sales and Sales for Redwood	You can remove the **Things to Finish** and the **News and Announcements** sections of the home page, by clicking **Home Page Display** (top icon in the Appearance tool) and setting **Visible** to **No**.	In the Appearance tool, click **Home Page Display**	Covered in the same video and topic.
4	Both Classic Sales and Sales for Redwood	Publish your sandbox.	Click **Publish** in the sandbox.	Covered in the same video and topic.

Step	Applies To	Description	Navigation	Where to Get More Details

Navigation and Infolet Tabs

Here's an overview of the steps to configure navigation and specify which infolet tabs appear in the Analytics section. Infolets are important only for Classic Sales.

Step	Applies To	Description	Navigation	Where to Get More Details
1	Both Classic Sales and Sales for Redwood	Sign in as users with the different job roles you are using and review the default navigation for each to see which items you want to hide or configure. Classic Sales icons appear in the Sales tab. Sales for Redwood icons in the Redwood Sales tab.	Not applicable.	See the topic: *What Different Sales Job Roles See in the Navigator and Springboard*
2	Both Classic Sales and Sales for Redwood	Create a sandbox with the Structure tool.	**Configuration** > **Sandboxes**	See the video and topic: *Configure Navigation*
3	Both Classic Sales and Sales for Redwood	Specify which items salespeople see on the Navigator and which icons they see on the home page springboard and in which order. You can hide unwanted items from everyone or you can add EL Expression conditions to make them visible only to a subset of users. You can make features accessible from both the Navigator and the home page springboard, or from the Navigator only.	In the sandbox, select **Tools** > **Structure**	Covered in the same video and topic.
4	Classic Sales	For Classic Sales, specify which infolet tabs in the Analytics section appear and in which order. All of the Workspace infolets you need to display key sales information are available within the Sales Infolet tab, so you can hide the rest unless you need them.	In the Structure tool, click the **Home Configuration** tab.	Covered in the same topic.
5	Both Classic Sales and Sales for Redwood	Publish your sandbox.	Click **Publish** in the sandbox.	Covered in the same topic.

Workspace Infolet Configuration

Step	Applies to	Description	Navigation	Where to Get More Details
1	Classic Sales	Create and enter a sandbox with Page Composer as your tool. If you want to display different Workspace infolet configurations for different job roles, you can specify a job role.	**Configuration** > **Sandboxes**	See the topic: *Create and Enter a Sandbox with Page Composer as Your Tool*
2	Classic Sales	Specify which Workspace infolets you want to expose on the page and how you want the page to look.	While in Page Composer, select each infolet you want to display from the **Infolet Repository**.	See the topic: *Specify Which Workspace Infolets Display and In What Order*
3	Classic Sales	Configure the content of each Workspace infolet. You can: • Change the infolet title • Specify which Workspace saved searches salespeople can select • Choose the fields that display in each record for each saved search	While in Page Composer, open each Workspace infolet and go to **Actions** > **Configure**	See the topic:*Configure Workspace Infolets*
4	Classic Sales	Remove any unused infolets from the list of infolets available for display.	While in Page Composer, open each Workspace infolet and go to **Actions** > **Edit Visibility**	Covered in the same topic.
5	Classic Sales	Save your work by clicking **Close** in the Page Composer toolbar, and publish your sandbox.	Click **Close** in Page Composer and then **Publish** in the sandbox.	N/A
6	Classic Sales	In Application Composer, you can enable, disable, or reorder the actions users can take for each object. This setup is optional.	**Application Composer** > **Common Setup** > **Smart Actions**	See the topic *Overview of Smart Actions* in the Configuring Applications Using Application Composer guide.

Configure Home Page Appearance

Oracle provides you with a default home page design that salespeople can use to access all of the navigation icons and key sales information they need. While you can still use alternate multipage designs that are more configurable, Oracle recommends that for Classic Sales, you use the default theme and limit your configuration to uploading your logo and hiding sections of the page you don't need. You can't change the order of the sections on the page.

Watch video

1. Create and enter a sandbox with the Appearance tool enabled:
    a. In the Navigator, click **Configuration** > **Sandboxes**.
    b. Click **Create Sandbox**.
    c. Enter a sandbox name.
    d. Select **Active** for the **Appearance** tool.
    e. Click **Create and Enter**.
    f. From the sandbox **Tools** menu, select **Appearance** to enter the tool.
2. In the **Logo** field, select **File** from the list and upload your logo.

    The logo image must be saved as a .png file with a transparent background with a recommended maximum size of 200 pixels wide and 50 pixels high.
3. If you're hiding the Things to Finish and News and Announcements sections, there's no point in uploading an image using **Cover Image**. The image appears in the center of the page under these sections.
4. Remove either or both of the **Things to Finish** and **News and Announcements** sections of the page if you aren't using them. Things to Finish displays notifications you can also access from the toolbar. News and Announcements can display your company-wide announcements. Here's how to hide them:
    a. Click **Home Page Display**, the top icon on the page.
    b. Click in the **Visible** column for each section and select **No**.
5. View your new home page configuration while inside the sandbox by clicking **Home**.
6. Publish the sandbox:
    a. Click the sandbox name and select **Publish**.
    b. On the Sandbox Detail page, click **Publish**.

        You can check the progress of the publish process in the Current Status section.

Configure Navigation

The Different Factors That Determine What Users See on the Home Page

Which selections users see in the Navigator, and which icons and infolets they see on the home page depends on a number of factors:

- Security roles

  What users see in the UI is primarily determined by their security roles. For example, users you provision with any of the standard sales job roles, get to see all of the sales navigation, including Opportunities, Accounts, Leads, Contacts, and so on. But they don't see the Security Console, a feature only available to users with the IT Security Manager job role. Because users are granted the Employee abstract role, they get many human resources features on the Navigator that aren't pertinent to sales unless you're implementing Oracle HCM Cloud.

- Configuration in the Structure tool

  Use the Structure tool to fine-tune the access granted by the security roles:

  - Specify if navigation is available in the Navigator and the springboard or hidden from users. You can create, edit, and change the order of the different headings (called groups) and even create new groups.
  - Specify which sales infolet tabs appear and in which order.

  You can add conditions (EL Expressions), to display or hide specific items or groups. For example, you can remove an item from view for a specific user or a specific job role. Sales representatives have the security permissions to import accounts and contacts and monitor background processes, but you may want to leave these rather technical tasks for sales administrators. Some selections already include EL Expressions that make items visible depending on system profile option settings or only when you enable a particular functional area of an offering. You can append additional conditions to the existing expressions.

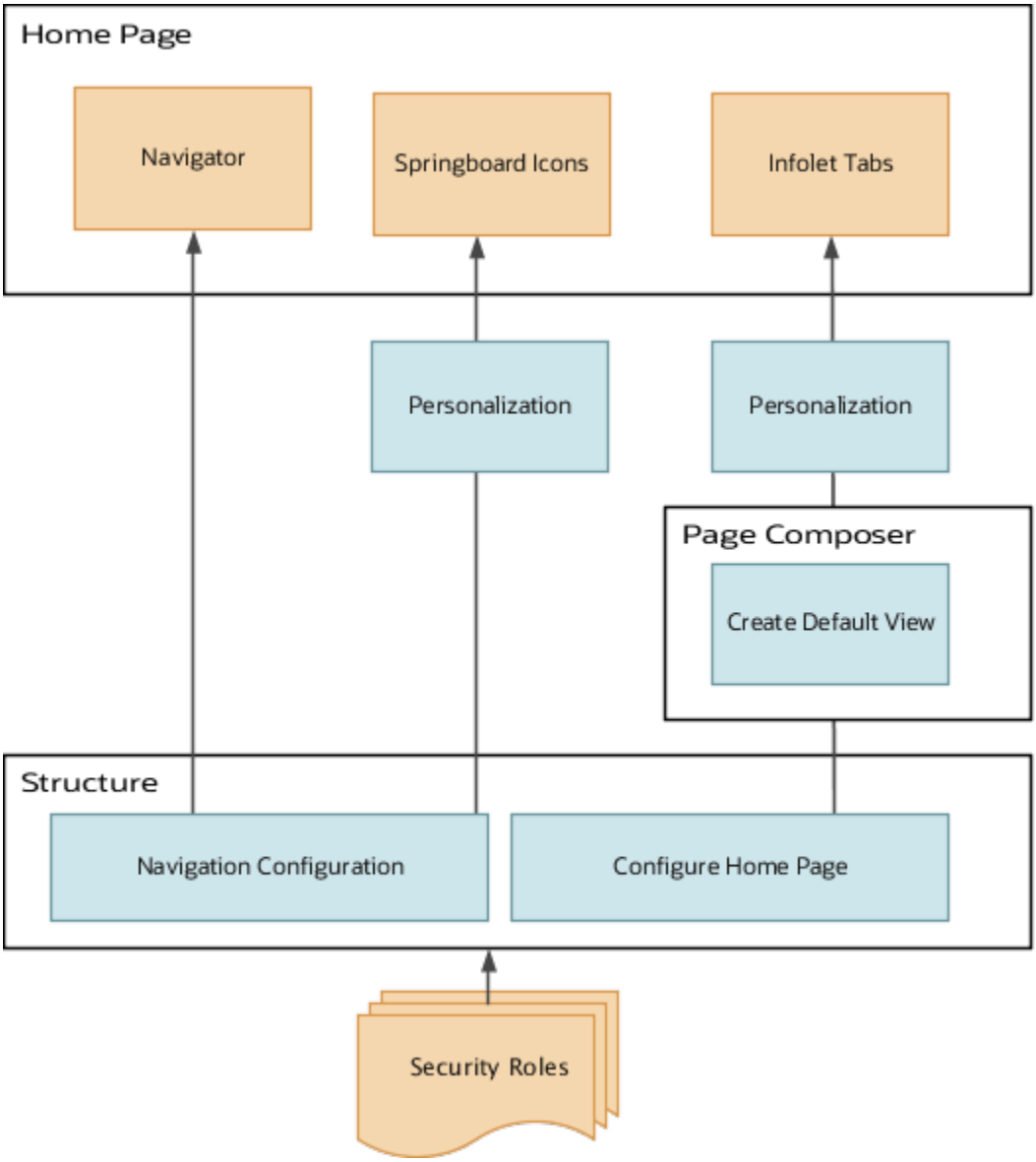
- Default infolet views you create

  Using Page Composer, you can specify which infolets appear in an infolet tab by default and in which order. Hiding an infolet doesn't remove the infolet entirely. Users can always add it back to their home page. If you want to hide infolets from users entirely, you must edit the visibility of each one. See the Enable and Configure Workspace Infolets section for details.

- Personalization

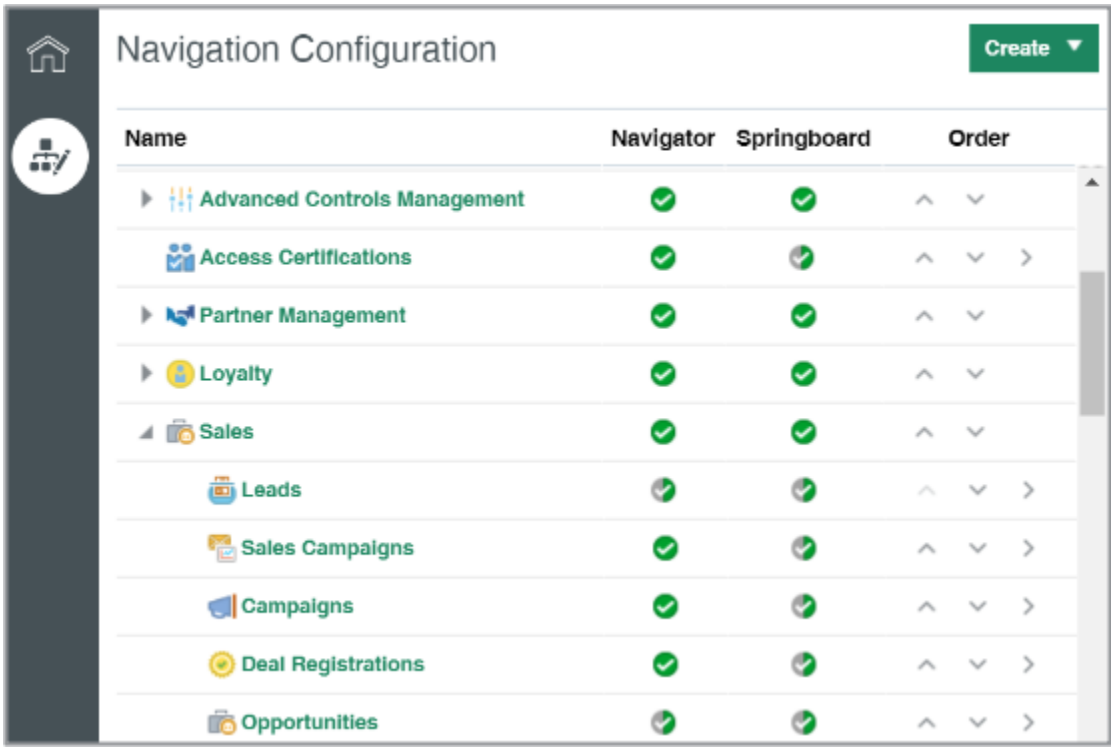
  Individual users can create their own personal views of the navigation icons they see on their springboard, but they can't change what displays on the Navigator. Users can also select the infolets they want to display and change their display order. Any personalization supersedes the default Infolet views you created.

Here's a diagram that illustrates the different factors that together determine what a user sees in the Navigator, on the springboard, and in the infolet tabs.



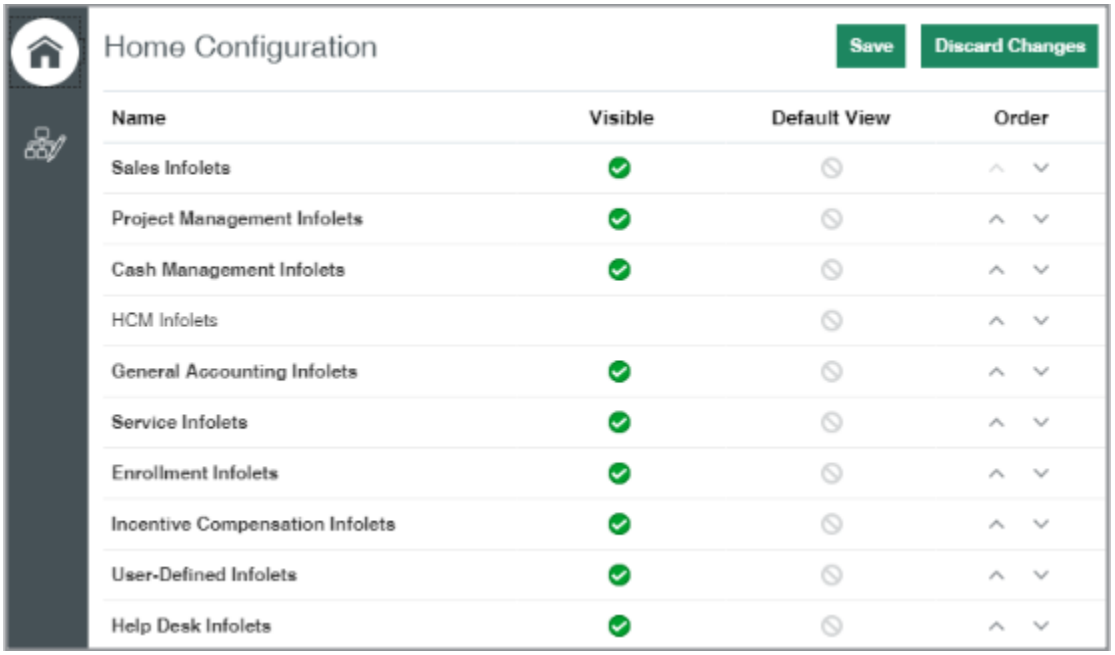
Navigation Configuration

The Navigation Configuration page displays all the feature selections available to all users of Oracle Fusion Cloud applications. It's not filtered by the security roles. So, you don't have to hide selections that are never displayed to sales users. To change the display setting and to add EL Expression conditions, you must drill down into each item.



Infolet Tab Configuration

Use the Home Configuration page in the Structure tool to specify which infolet tabs users get to see in the Analytics section of the home page. Just like the Navigation Configuration page, this page shows you the selections for all applications. You can hide, add EL Expressions, rename, and reorder.



What Different Sales Job Roles See in the Navigator and Springboard

To help you configure navigation, here's an overview of what users with common sales job roles see by default in the Navigator and springboard. The different Navigator items are grouped under headings.

The table lists all the headings, but not every item under every heading. If it makes sense to hide the whole heading, there's no need to list each item. For each of the common job roles, you learn if the item or category is displayed in both the Navigator and springboard, in the Navigator only, or in neither.

Navigator Heading, Item	Sales Representative	Sales Manager	Sales VP	Sales Administrator	Recommendation
Me	Navigator only	Navigator only	Navigator only	Navigator only	All of the items under the Me category come from the Oracle Human Resources Cloud. Unless you're implementing HCM, remove all of the items here except Roles and Delegations. Salespeople can use Roles and Delegations to see which security roles are assigned to them, and request more, depending on your security setup.
My Team, Users and Roles	Navigator only	Navigator only	Navigator only	Navigator only	Remove. Only setup users can use Users and Roles to create and manage sales users.
Partner Management	Neither	Neither	Neither	Both	Remove unless you're using Oracle Partner Management
Sales, Leads	Both	Both	Both	Both	Sales leads work area.
Sales, Deal Registrations	Neither	Neither	Neither	Both	Remove unless you're using Oracle Partner Management
Sales, Forecasts	Both	Both	Both	Both	Sales work area where you submit, adjust, and review sales forecasts.

Navigator Heading, Item	Sales Representative	Sales Manager	Sales VP	Sales Administrator	Recommendation
Sales, Activities	Both	Both	Both	Both	Work area where salespeople manage their calendar and tasks, log calls and emails, and other activities.
Sales, Products	Neither	Neither	Neither	Both	Create and manage products for the sales catalog, and upload product images.
Sales, Competitors	Both	Both	Both	Both	View and manage sales competitors. Sales Administrators can create competitors. The other sales roles can only view them.
Sales, Opportunities	Both	Both	Both	Both	Work area for managing sales opportunities.
Sales, Accounts	Both	Both	Both	Both	Work area salespeople use to manage their accounts.
Sales, Analytics	Both	Both	Both	Both	Central work area for viewing BI reports.
Sales, Price Books	Neither	Neither	Neither	Both	Price the products you're selling and to offer discounts.
Sales, Territories	Neither	Navigator only	Both	Both	Sales territory management for Sales Managers and Sales Administrators.
Sales, Campaigns	Navigator only	Both	Neither	Navigator only	Marketing campaign information from Oracle Marketing Cloud. Remove unless you're implementing integration with Oracle Marketing Cloud (Eloqua).

Navigator Heading, Item	Sales Representative	Sales Manager	Sales VP	Sales Administrator	Recommendation
Sales, Quotes and Orders	Navigator only	Navigator only	Navigator only	Navigator only	Remove unless you're implementing integration with Oracle Configure, Price, and Quote (CPQ) Cloud.
Sales, Contacts	Both	Both	Both	Both	Sales contacts work area.
Sales, Recommendations	Neither	Both	Both	Both	Remove. No longer used.
Sales, Lightbox	Both	Both	Both	Both	Enables salespeople to share and collaborate on presentations.
Sales, Promotions	Neither	Neither	Neither	Both	Sales administrators can create promotions to offer discounts.
Sales, Quotas	Neither	Both	Both	Both	Enables sales managers and sales administrators to set sales quotas for their directs.
Help Desk	Navigator only	Navigator only	Navigator only	Navigator only	Remove unless you're implementing Oracle Help Desk.
Business Plans	Both	Both	Both	Both	Salespeople and managers can use it to create business plans for the accounts they serve.
Contract Management	Neither	Neither	Neither	Navigator only	Remove. Sales users, including Sales Administrators cannot use contracts without additional security roles.
Incentive Compensation	Navigator only	Navigator only	Navigator only	Navigator only	Manage sales compensation.
Procurement	Navigator only	Navigator only	Navigator only	Navigator only	Remove unless you're implementing purchasing.

Navigator Heading, Item	Sales Representative	Sales Manager	Sales VP	Sales Administrator	Recommendation
My Enterprise, Offerings	Neither	Neither	Neither	Both	Sales administrators and setup users enable the offerings related to the applications they purchased. You must enable the offering and its features for implementation.
My Enterprise, New Features	Neither	Neither	Neither	Navigator only	Sales administrators and setup users
My Enterprise, Subscriptions	Neither	Neither	Neither	Navigator only	Oracle Subscription Management information. Remove unless you're implementing Oracle Subscription Management.
Tools, Set Preferences	Both	Both	Both	Both	Lets users reset their password and upload their picture. The same Set Preferences is also available in the Settings and Actions menu that you can open by clicking on your user initials or image.
Tools, Spaces	Navigator only	Navigator only	Navigator only	Navigator only	Remove. Oracle Web Center Portal.
Tools, Scheduled Processes	Both	Both	Both	Both	Lets you monitor and run background processes.
Tools, File Import and Export	Navigator only	Navigator only	Navigator only	Navigator only	Remove. Imports Oracle Web Center content. Not used in Oracle Classic Sales.
Tools, Smart Text	Neither	Neither	Neither	Navigator only	A feature administrators and implementors can use to change UI text and prompts.
Tools, Deep Links	Neither	Neither	Neither	Navigator only	Deep links make it possible to navigate from your company's

Navigator Heading, Item	Sales Representative	Sales Manager	Sales VP	Sales Administrator	Recommendation
					pages directly to a page within your sales application without going through the menu structure.
Tools, Contact Search	Neither	Neither	Neither	Navigator only	Remove if you aren't using the telephony (CTI) feature.
Tools, Import Management	Navigator only	Navigator only	Navigator only	Navigator only	Import accounts, contacts, products and other sales information from a file.
Tools, Download Desktop Integration Installed	Navigator only	Navigator only	Navigator only	Navigator only	Remove if you aren't deploying Oracle Sales for Outlook.
Tools, Notification Preferences	Neither	Neither	Neither	Navigator only	Remove. Not used in sales. Feature to trigger automatic notifications.
Tools, Worklist	Both	Both	Both	Navigator only	Worklist notifications.
Tools, Reports and Analytics	Both	Both	Both	Navigator only	Create BI reports you can display in your sales application.
Tools, Export Management	Navigator only	Navigator only	Navigator only	Navigator only	Export accounts, contacts, products and other sales information as a file.
Tools, Mass Transfer	Neither	Neither	Neither	Both	Transfer data to other environments, for example, from test to production.
Configuration, Appearance	Neither	Neither	Neither	Navigator only	Change application home page layout, logos, icons and other feature.
Configuration, Structure	Neither	Neither	Neither	Navigator only	Change Navigator and springboard layout.

Navigator Heading, Item	Sales Representative	Sales Manager	Sales VP	Sales Administrator	Recommendation
Configuration, Business Objects	Neither	Neither	Neither	Navigator only	Configure additional business objects for your application.
Others, Resource Directory	Navigator only	Navigator only	Navigator only	Navigator only	View the sales organization hierarchy.
Others, My Dashboard	Both	Both	Both	Both	Remove. Provides an alternative home page for your company.
Others, Setup and Maintenance	Neither	Neither	Neither	Both	Access setup tasks.
Others, Social	Both	Both	Both	Both	Opens the Oracle Social Network UI.
Others, Marketplace	Both	Both	Navigator only	Both	Links to Oracle Cloud Marketplace where you can view partner applications.
Others, Getting Started	Both	Both	Both	Both	Access short videos to help users get started. Your organization can add your own videos here.
Others, Cloud Customer Connect	Navigator only	Navigator only	Navigator only	Navigator only	Opens Cloud Customer Connect where users can interact with other users and ask questions.
Workspace	Both (after you enable Workspace)	Both (after you enable Workspace)	Both (after you enable Workspace)	Both (after you enable Workspace)	Workspace appears both in the Navigator and springboard automatically when you enable the feature. The Home Configuration page includes two versions of Workspace. One provides access to Workspace for sales job roles. The second version provides access for service job roles. The service version includes the ability to

Navigator Heading, Item	Sales Representative	Sales Manager	Sales VP	Sales Administrator	Recommendation
					view records in nested tabs (the dynamic tabs feature). Users see only one of these items, depending on their security privileges.

Configure Navigation

Use the Structure tool to configure which selections appear in the Navigator, which icons area available on the springboard, and which infolet tabs are visible to users.

Watch video

Create and Enter a Sandbox with the Structure Tool

Create and enter a sandbox with the Structure tool:

1. Navigate to **Configuration** > **Sandboxes**.
2. Click **Create Sandbox**.
3. In the Create Sandbox page, enter a name and select **Structure** as the tool.
4. Click **Create and Enter**.

   The Sandbox toolbar appears at the top of the page.
5. From **Tools**, select **Structure** to open the Structure page.

Specify What Users See on the Navigator and in the Springboard

With the **Navigation Configuration** tab selected, you can configure what appears on the Navigator and springboard. Just click the item or group name to edit.

- Specify where and for whom the item shows up by making a selection from **Show on Navigator** and **Show on Springboard**. You can choose to display individual items in the Navigator only, in both the Navigator and springboard, or in neither. You can't display an item in the springboard only. If you hide an item in the Navigator, it gets automatically hidden on the springboard as well. Here are the options:
  - **Yes**: displays the item for all users with the right security permissions.
  - **No**: hides the item from all users in all applications.

- **EL Expression**: lets you add an EL Expression that must be true to display the item.

  Add EL Expression conditions to display items or groups selectively to users with specific job roles, or even by user name. Here are some examples of EL Expressions you can use:

Who can see the group or page entry	EL Expression and Example

Only users having any of the specific roles	`#{securityContext.userInRole['<Role_Name>']}`
	
	`#{securityContext.userInRole['ORA_FND_APPLICATION_ADMINISTRATOR_JOB,ORA_PER_EMPLOYEE_ABSTRACT']}`

Only users not having any of the specific roles	`#{!(securityContext.userInRole['<Role_Name>']}`
	
	`#{!(securityContext.userInRole['ORA_FND_APPLICATION_ADMINISTRATOR_JOB,ORA_PER_EMPLOYEE_ABSTRACT'])}`

Only users having all of the specific roles	`#{securityContext.userInAllRoles['<Role_Name>']}`
	
	`#{securityContext.userInAllRoles['ORA_FND_APPLICATION_ADMINISTRATOR_JOB,ORA_PER_EMPLOYEE_ABSTRACT']}`

Only users not having all of the specific roles	`#{!(securityContext.userInAllRoles['<Role_Name>']}`
	
	`#{!(securityContext.userInAllRoles['ORA_FND_APPLICATION_ADMINISTRATOR_JOB,ORA_PER_EMPLOYEE_ABSTRACT'])}`

Only users having access to specific resources, for example, the Social work area	`#{securityContext.userGrantedResource['resourceType=FNDResourceType;resourceLaunch_Social_Menu;action=launch']}`

- Rename a group and change its icon.
- Move items to a different group by using the arrow keys, or by selecting a different group while editing the item. You can't nest groups within other groups.

  For example, move both Workspace items from the Workspace group to the Sales group. There are two Workspace items because Oracle provides two different versions of Workspace: one for sales and one for service. Users see only one icon on their home page, depending on their security settings.
- Copy items.
- Move items within a group using the up and down arrow keys.

  For example, you may want to move the Workspace icon to be the first icon users see on their page.

- Get rid of the **Others** group.

  Any top-level items (items that aren't part of a group in the Structure tool) display in the Others group in the UI. You can't rename that category or move it, but you can hide the group by moving or hiding all items in it.

- Create new groups and add your own content.

  You can create new groups from the **Create** menu and display them selectively by adding EL Expressions. You can copy items into the group or create your own items by selecting **Create Page Entry** from the **Create** menu.

  > **Note:** To simplify future functionality updates, don't create groups to provide different views for different sets of users, however. Add the EL Expressions to individual items instead.

Example of Hiding a Whole Navigator Group You Don't Use

If you aren't implementing Oracle Global Human Resources Cloud, then hide the whole **Me** group, which appears in the Navigator for all sales users by default.

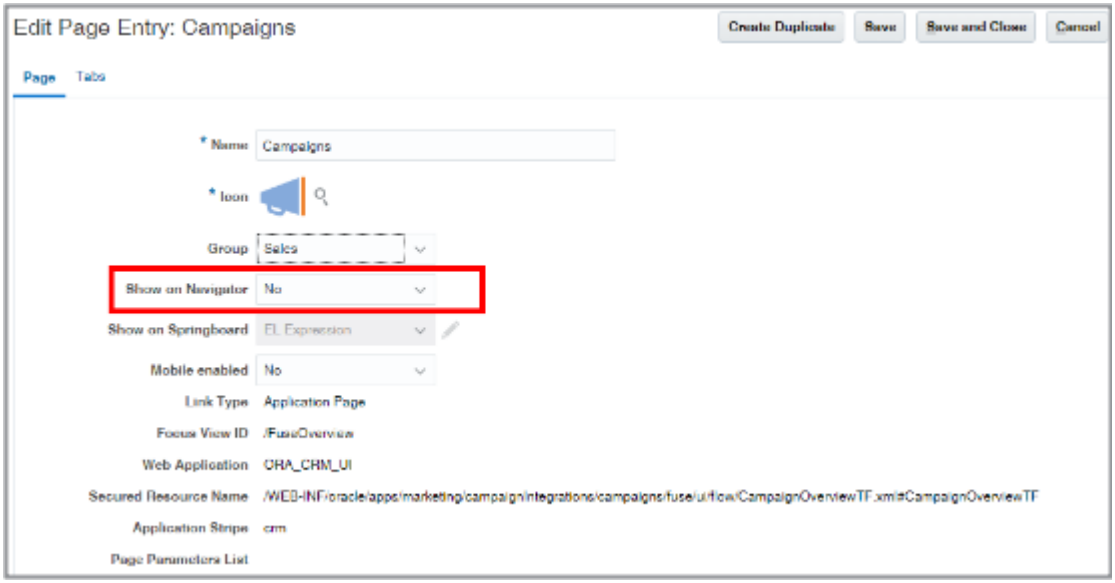
1. Click the **Me** group name.
2. Set **Show on Navigator** to **No**. Hiding the group hides all of the individual items in the group as well.

Example of Hiding an Individual Sales Feature You Don't Use

If you aren't implementing Oracle Marketing Cloud, then remove the **Campaigns** item from both from the Navigator and springboard:

1. Open the **Sales** group to display the different sales features.
2. Click **Campaigns**
3. In the Edit Page Entry page, set **Show on Navigator** to **No**.

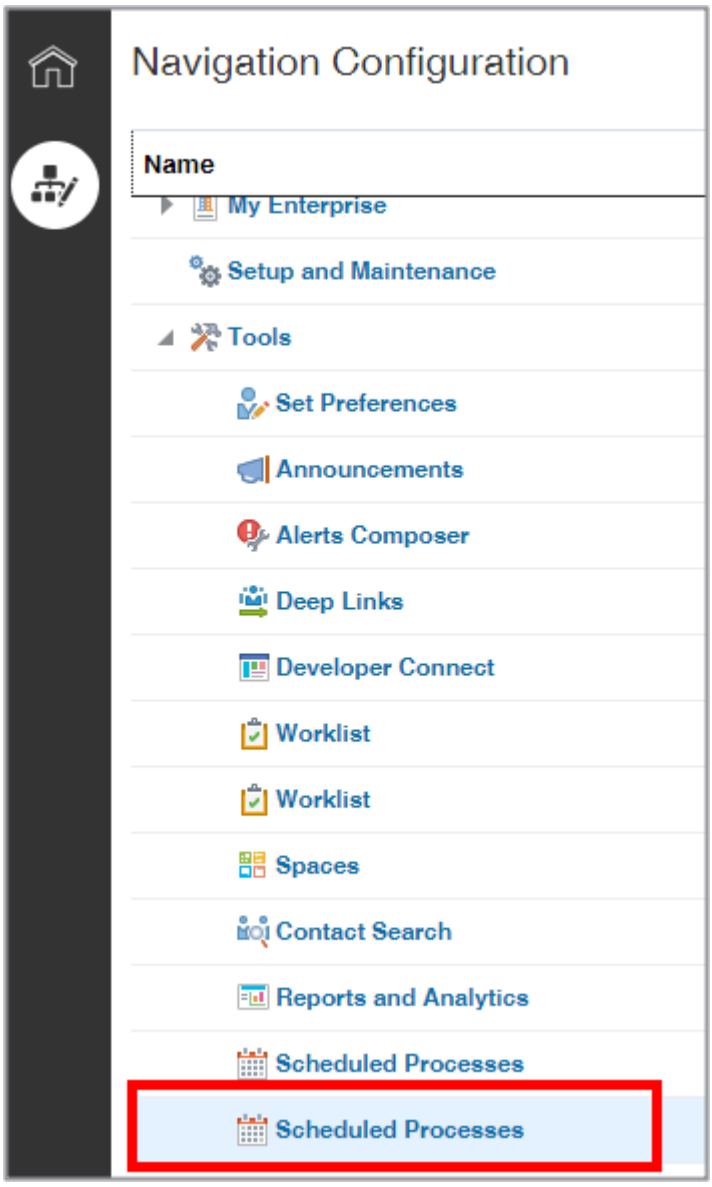
   Removing the selection from the Navigator automatically removes the link from the springboard as well. You can't display a selection on the springboard if it's not displayed in the Navigator



Selectively Hide Navigation

You may want to leave technical tasks, such as importing data or monitoring scheduled processes, to sales administrators. To remove the navigation links for a subset of users, you edit the EL Expression for these items and add your conditions. For example, here's how to remove the Scheduled Processes navigation from both the Navigator and springboard for all salespeople with the Sales Representative job role:

1. Open the **Tools** group to display its selections.
2. Click the second **Scheduled Processes** item.
   Here's a screenshot of a portion of the Navigation Configuration page highlighting the item.



> **Note:** Oracle includes two Scheduled Processes items in the list because it supports two different interfaces for scheduled processes. If you aren't sure which item to edit, add your condition to both.

3. Click **Edit** for **Show on Navigator** to edit the EL Expression.

The Expression Editor displays the expression provided by Oracle. In this example:

```
#{(securityContext.userGrantedResource['resourceType=FNDResourceType;resourceName=FND_Scheduled_Processes_Menu;a
and(Profile.values.ESS_ALLOW_CLASSIC_INTERFACE ne null) and (Profile.values.ESS_ALLOW_CLASSIC_INTERFACE
ne 'Y')}
```

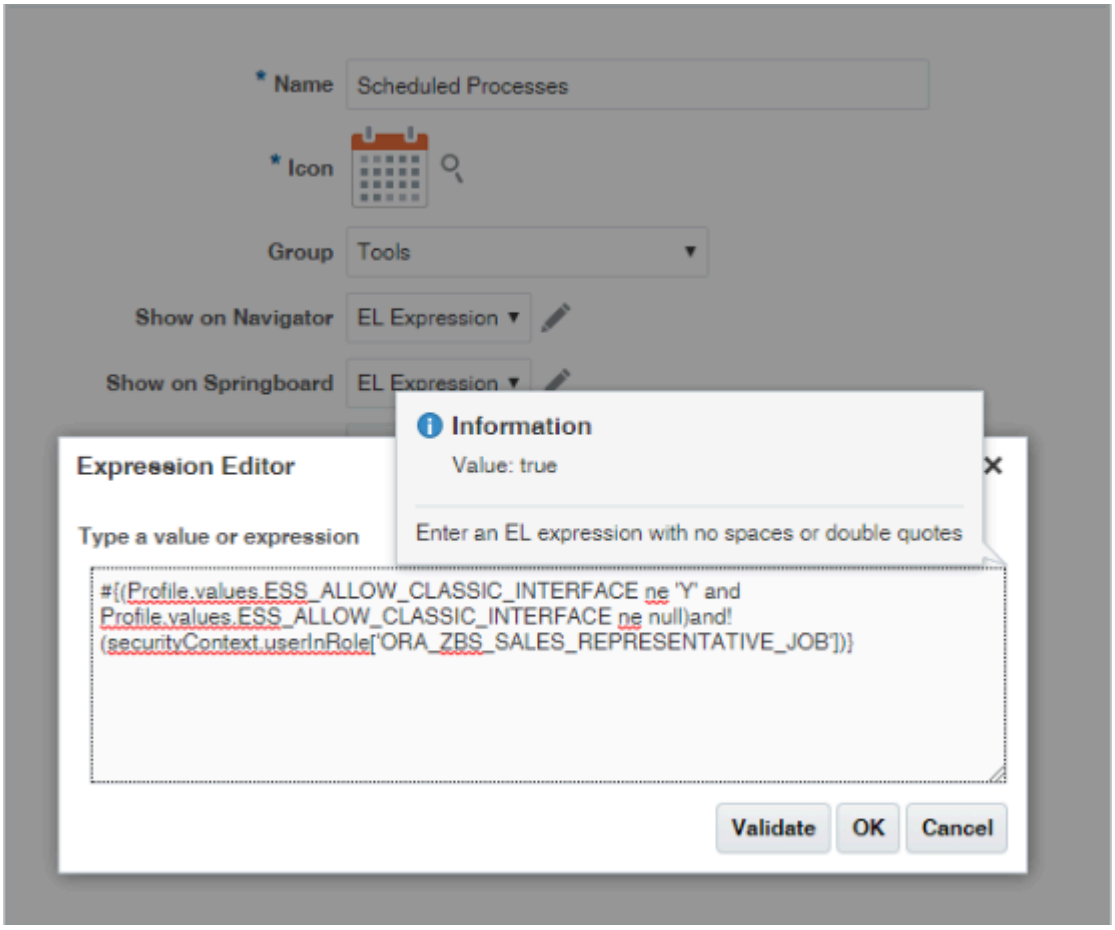
4. In the Expression Editor, append the condition: `and!(securityContext.userInRole['ORA_ZBS_SALES_REPRESENTATIVE_JOB'])` to the original expression.

   Here's the resulting expression:

   ```
   #{(securityContext.userGrantedResource['resourceType=FNDResourceType;resourceName=FND_Scheduled_Processes_Menu;a
   and(Profile.values.ESS_ALLOW_CLASSIC_INTERFACE ne null) and (Profile.values.ESS_ALLOW_CLASSIC_INTERFACE
   ne 'Y')and!(securityContext.userInRole['ORA_ZBS_SALES_REPRESENTATIVE_JOB'])}
   ```

5. Click **Validate** to check for errors.
6. Click **OK**.
7. It's a good idea to click **Save** after each edit to make sure your changes are saved.
8. Repeat the steps to add the condition to the **Show on Springboard** EL Expression.

   Here's a screenshot of the Expression Editor with the edited Show on Springboard expression: :`#{(Profile.values.ESS_ALLOW_CLASSIC_INTERFACE ne 'Y' and Profile.values.ESS_ALLOW_CLASSIC_INTERFACE ne null)and!(securityContext.userInRole['ORA_ZBS_SALES_REPRESENTATIVE_JOB'])}`



Specify Which Infolet Tabs Appear and in Which Order

You can specify which infolet tabs appear and in which order.

1. While in the Structure tool, click the **Home Configuration** tab.
2. Use the arrow keys to change the order of the infolet tabs.
3. To edit the infolet tab name and to specify how the infolet page gets displayed, click its name:
    - **Yes**: displays the infolet tab for all users with the right security permissions.
    - **No**: hides the infolet tab from all users in all applications.
    - **EL Expression**: lets you add an EL Expression condition that must be true to display the infolet page.
4. To create additional infolet tabs with your own content, you can edit the five sales tabs crated for this purpose: **Sales Page 1** through **Sales Page 5**.

Related Topics

- What are the supported and unsupported EL expressions?
- Get Started with Configuring Navigation

Enable and Configure Workspace Infolets (Classic Sales)

Enable Workspace Infolets for the Classic Sales Home Page

Enable the infolets on the Home page by setting the profile Enable Workspace Infolets (ZCA_ENABLE_ADAPTIVE_INFOLETS) to Yes. Here's how:

1. In the Setup and Maintenance work area, go to the **Manage Administrator Profile Values** task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. On the Manage Administrator Profile Values page, search for the profile option by entering ZCA_ENABLE_ADAPTIVE_INFOLETS in the **Profile Option Code** field.
3. Click **Search**.
4. In the ZCA_ENABLE_ADAPTIVE_INFOLETS: Profile Values section, set the profile value to Yes.
5. Click **Save and Close**.

Create and Enter a Sandbox with Page Composer as Your Tool

You can create different Workspace infolet configurations for the whole enterprise, or for specific job roles. If you're configuring different configurations of Workspace infolets for different job roles, then you must create separate sandboxes for each job role.

1. Navigate to **Configuration** > **Sandboxes**.
2. Click **Create Sandbox**.

3. In the Create Sandbox page, enter a name and select **Page Composer** as the tool.
4. If you want to create different infolet configurations for different user roles, select the job role:
    a. Click **Edit** in the **Support Context** column for Page Composer.
    b. In the Edit Sandbox Context window, select **Job Role** and select the job role you want to configure.

       Each job role can access different saved searches and can have a different infolet configuration on their page.
    c. Click **OK**.
5. Click **Create and Enter**.

   The Sandbox toolbar appears at the top of the page.
6. Click **Home** to return to the home page.
7. In the sandbox, select **Page Composer** from the **Tools** menu.

   The Page Composer toolbar appears underneath the sandbox toolbar.

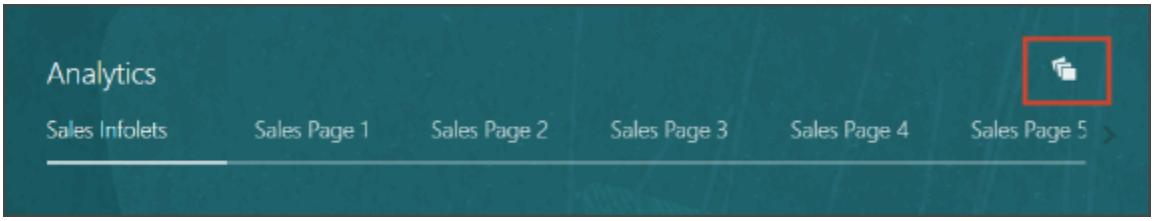
Specify Which Workspace Infolets Display and In What Order

Use this procedure to specify which infolets salespeople see when they open the page and in which order.

1. With Page Composer and your sandbox open, scroll down to the **Analytics** section, Sales Infolets tab, where the Workspace infolets are located.

2. You must expose Workspace infolets one by one. Here's how:

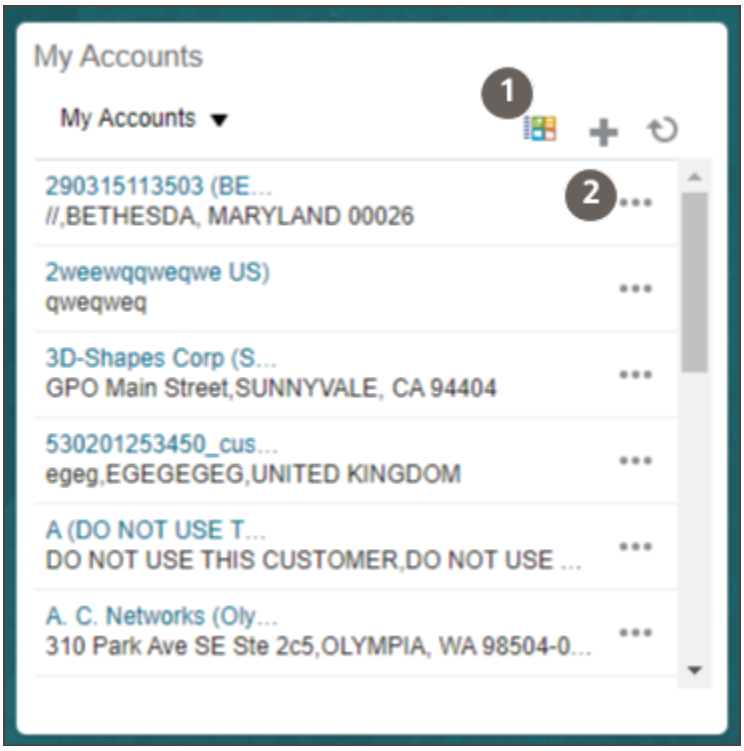
    a. Click **Infolet Repository** (the file icon on the top right side of the Analytics heading highlighted in the screenshot).



    b. Select one of the 10 Workspace infolets. If the list includes two infolets with the same name, select the second one on the list. For example, the Infolet Repository list may include two entries for My Account, My Opportunities, and so on.

> **Note:** Even though you set the profile to use the Workspace infolets, the older version of actionable infolets remains present when you configure the view for a site, for example. These older infolets are present on the list during configuration, but not displayed to users because of the value of the EL Expressions they contain.

    c. Make sure the infolet that's displayed on the page is a Workspace infolet. Workspace infolets include the Workspace icon (callout 1) and the three dots for quick actions (Callout 2). Here's a screenshot of the My Accounts Workspace infolet.



    If you displayed the wrong infolet by mistake, just expose the second one.

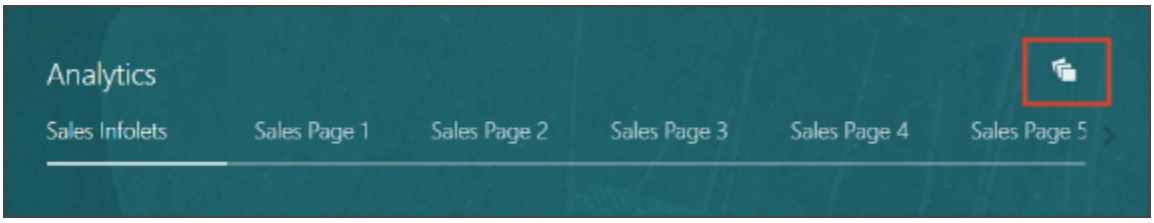
3. Change the order of the infolets by dragging them around. Alternately, you can click the **Infolet Repository** icon, scroll down in the list and select **Reorder Infolets**.

4. If you are done with your configuration, be sure to click **Close** on the Page Composer toolbar to save your changes before publishing the sandbox.

Configure Workspace Infolets

You can configure any of the 10 Workspace infolets provided by Oracle, including the six that are predefined for you.

1. With Page Composer and your sandbox open, scroll down to the **Analytics** section, Sales Infolets tab, where the Workspace infolets are located.
2. If the infolet you want to configure isn't displayed in the Sales Infolets tab, you must display it on the page. Here's how:
    a. Click **Infolet Repository** (the file icon on the top right side of the Analytics heading highlighted in the screenshot).



    b. Select the Workspace infolets you want to configure. If you're configuring one of the predefined infolets, and the list includes two infolets with the same name, select the second one on the list. For example, the Infolet Repository list may include two entries for My Account, My Opportunities, and so on.

> **Note:** Even though you set the profile to use the Workspace infolets, the older versions of the predefined infolets remain present when you make site-level configurations. These older actionable infolets are present on the list during configuration, but not displayed to users. You can recognize which infolet is which because the predefined Workspace infolets include the Workspace icon and the three dots for quick actions.

Change the Infolet Title

1. In the right top corner of an infolet, click **Actions** (the down arrow) and select **Edit Title and Views**.
2. Edit the title.
3. Click **Save and Close**.

> **Note:** You can't add use the other sections of this window to configure Workspace infolets. You can't display BI reports or other content on the back of this type of infolet.

4. If you're done with your configuration, be sure to click **Close** on the Page Composer toolbar to save your changes before publishing the sandbox.

Specify Which Saved Searches Appear in the Infolet

1. In the right top corner of an infolet, click **Actions** (the down arrow) and select **Configure**.
2. In the Manage Infolet window, **Filters** tab, use the arrows to move the saved searches you want to display in the infolet to the **Selected** column. The saved searches determine what information salespeople can display

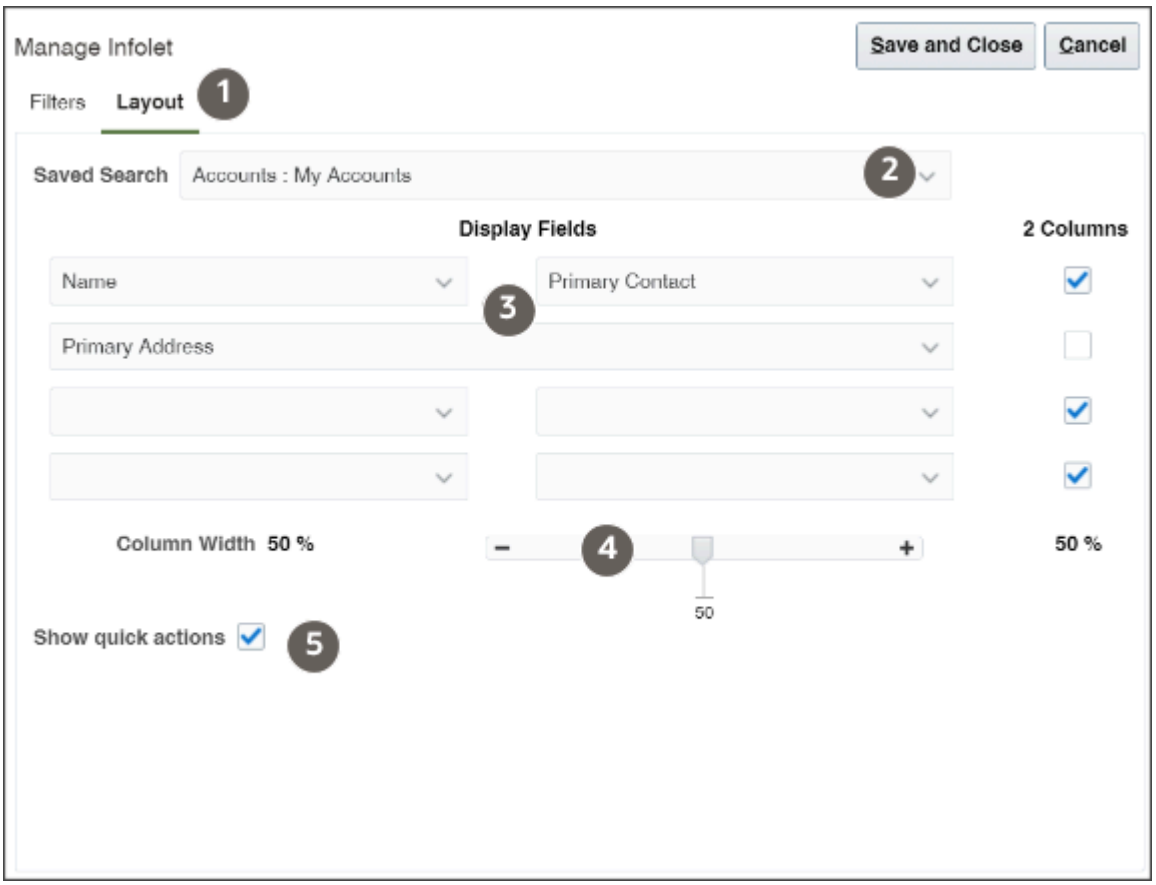
in the infolet. You aren't limited to selecting saved searches for just one object. For example, you could select Accounts: My Accounts and Assets: My Customer's Active Assets.

3. If you're done with your configuration, be sure to click **Close** on the Page Composer toolbar to save your changes before publishing the sandbox.

Specify What Fields Display for Each Saved Search

Here's how to determine which fields display on the infolet for each record. You must configure each saved search you are using separately.

1. In the right top corner of an infolet, click **Actions** (the down arrow) and select **Configure**.
2. In the Manage Infolet window, select the **Layout** tab (callout 1 in the screenshot).
3. Select the saved search you want to configure (callout 2).
4. Add the fields you want to display (callout 3). Be sure to always display the **Name** field: it provides the link that salespeople use to drill down into the record.
5. You can adjust the relative width of the columns using the slider (callout 4).
6. Keep the **Show quick actions** option selected to display the actions for each record (callout 5).



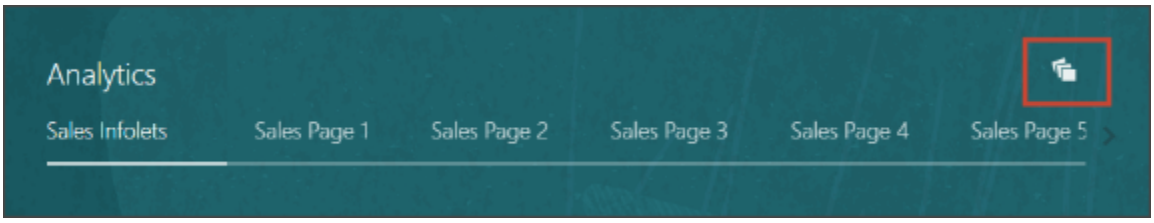
7. If you're done with your configurations, be sure to click **Close** on the Page Composer toolbar to save your changes before publishing the sandbox.

Hide Unused Workspace Infolets from Users

Remove unused Workspace infolets from use by changing their visibility. Unless you change their visibility, infolets are listed in the Infolet Repository list and available for display by salespeople even if you remove them from the page.

You may want to remove the four blank infolets (Additional Actionable Infolets) if you aren't using them, for example. Here's how:

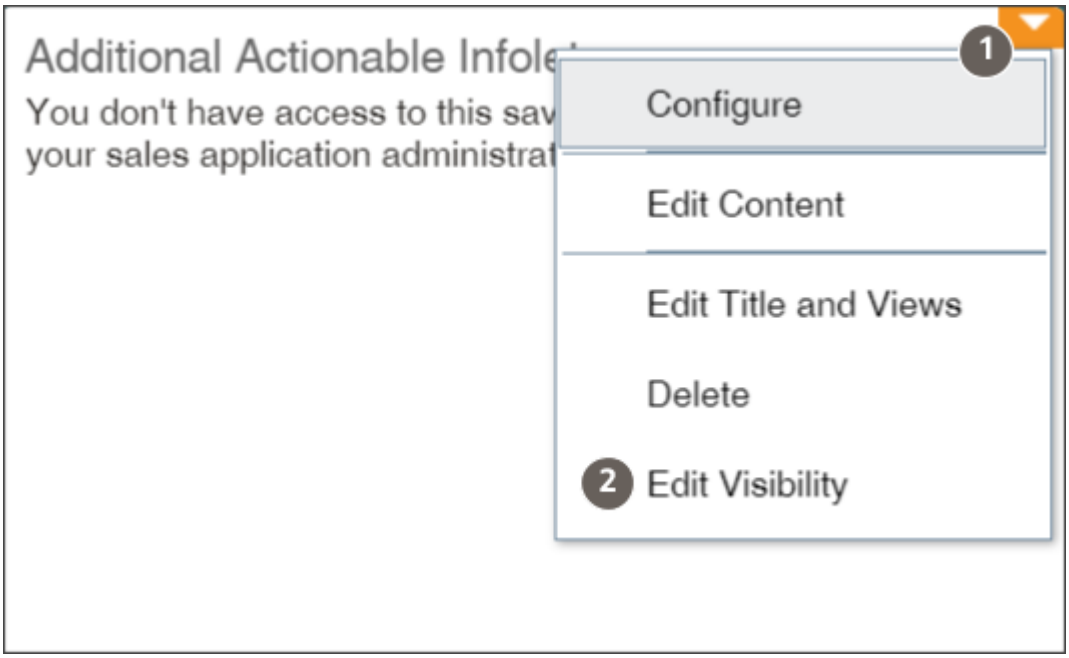
1. With Page Composer and your sandbox open, scroll down to the **Analytics** section, Sales Infolets tab, where the Workspace infolets are located.
2. Before you can change their visibility, you must expose the Workspace infolets you want to remove. Here's how:
    a. Click **Infolet Repository** (the file icon on the top right side of the Analytics heading highlighted in the screenshot).



    b. Select one of the Workspace infolets you want to remove. If you're removing one of the predefined infolets, and the list includes two infolets with the same name, select the second one on the list. For example, the Infolet Repository list may include two entries for My Account, My Opportunities, and so on.

> **Note:** Even though you set the profile to use the Workspace infolets, the older versions of the predefined infolets remain present when you make site-level configurations. These older actionable infolets are present on the list during configuration, but not displayed to users. You can recognize which infolet is which because the predefined Workspace infolets include the Workspace icon and the three dots for quick actions.

3. In the right top corner of the infolet, click **Actions** (the down arrow identified by callout 1) and select **Edit Visibility** (callout 2).



> **CAUTION:** Don't select **Delete**. Deleting removes the infolet entirely. If you delete an infolet by accident, you must contact Oracle Support to restore it.

4. In the Edit Visibility window, **Visible** list, select **No**.

5. Click **Save and Close**.

   The Workspace infolet is grayed out on the page. The infolet remains in listed in your Infolet Repository list, but it doesn't appear to users after you publish the sandbox.
6. If you're done with your configuration, be sure to click **Close** on the Page Composer toolbar to save your changes before publishing the sandbox.

14 Microsoft 365 Integration for Redwood UX

Overview of Microsoft Exchange Sync and Redwood Add-In

The Redwood UX add-in, known as the Oracle Sales for Outlook add-in, features task-oriented flows to simplify salespeople's daily sales activities. Optimized for Outlook, the intuitive Uls provide 360-degree sales information for meetings and emails, directly in the context of those meetings and emails. Salespeople can share meetings and emails with Sales. Emails are shared as conversation messages.

In addition, salespeople see a daily summary of appointments that they can act on. You can set a default saved search for each object across the organization and salespeople can set their preferred saved searches for sync using the add-in.

To begin implementing, start with the *How do I implement Microsoft 365 for Oracle Sales Redwood UX?* playbook on *Oracle Help Center > Sales > Playbooks page*.

View this video on Oracle Cloud Customer Connect to view an introduction to the app: *CX Sales Add-in for Microsoft Outlook*.

Capture Activities Automatically

The integration supports bidirectional sync for appointments, tasks, and contacts, as well as the automatic sync of appointments from Exchange to Sales. Appointments, tasks, and contacts can be synced from Sales to Exchange based on Workspace-defined saved searches.

Seamless Email Integration with Microsoft Exchange

With this integration, emails in Microsoft Outlook can be shared directly from the Redwood UX add-in or through the email sync feature. Salespeople can categorize these emails as “Shared with Oracle”, with replies automatically synced for seamless tracking and follow-up.

In addition, with the Microsoft Exchange email integration, emails can be sent via Microsoft Exchange directly from the Oracle Redwood web application. The Microsoft Exchange email integration is fully compatible with this integration's email sync functionality and the Redwood UX add-in, ensuring seamless connectivity and an enhanced user experience. Once enabled, this integration allows emails sent from Oracle Sales – such as those related to accounts or opportunities – to be delivered via Microsoft Exchange, with replies automatically synced back to Oracle.

See *Exchange Email Integration for Digital Sales* for more information.

Task-Oriented Functionality and Insights

The add-in's task-oriented functionality is directly geared to salespeople's day-in-the-life scenarios, in the context of Outlook interactions and interface.

Salespeople begin their day with a daily briefing, right in the add-in. Insights from Sales further help them engage with their customers, easily schedule and prepare for meetings, and review and respond to emails.

Improved Sign-In Experience

The add-in provides a better and more secure sign-in experience. Based on your company's policy, the add-in utilizes OAuth, a feature that allows salespeople stay signed in for longer.

Easily Customize and Deploy the Add-In

The add-in comes with predefined layouts to use as-is. If customizations are required, the predefined layouts can be easily tailored using the new Oracle Sales for Outlook tool in Application Composer. The tool makes it easy to migrate customizations from the earlier CX Sales for Microsoft 365 add-in or from the Oracle CX Sales Mobile application, so you don't need to manually rebuild the customizations for this integration.

15 Mobile

Overview of CX Sales Mobile

The Oracle CX Sales Mobile app helps your users manage their day effectively and develop customer relationships using their phone or tablet.

Read the following sections to learn more.

To begin implementing Mobile, start with *Overview of CX Sales Mobile Setup*.

Manage Sales Activities

Sales teams can manage Sales activities. Here are the highlights:

- Use the action-driven, configurable home page that contains a sales briefing, letting salespeople track the sales pipeline and stay on top of daily activities.
- Leverage optimized task-based flows for key sales functions: Accounts, contacts, leads, opportunities, activities, assets, service requests, partners, and custom objects.
- View, create, and edit tasks, appointments, and call reports.
- Saved searches that are shared across CX Sales Mobile and Workspace lists, for consistency across applications.
- View your recently accessed records in the app when using the global search, or when sharing notes from an external app.
- Add contacts and leads to CX Sales Mobile from the mobile device's address book.
- Create contacts and leads by using a photo of a business card.
- Scan an asset's bar code to search for an asset and automatically enter the asset serial number.
- Share notes, photos, videos, documents, or files from mobile to Sales accounts, opportunities, or other records.
- Plan your sales activities around your current location by viewing your nearby contacts, accounts, opportunities, and leads plotted on an interactive map. You can also plan future appointments in a city or near an address with an easy location search.
- View your quotes in the app and stay updated on the quote status. View and send quote proposal documents to customers, or share them with your team for feedback.
- View reports and analytics with modern visualizations optimized for mobile displays, such as bar graphs, funnels, bubble charts, and more. Role-based layouts let sales administrators provide unique experiences to salespeople, managers, and others.

Manage Partner Relationship Management Activities

Partners can manage Oracle Partner Relationship Management activities:

- Partner users can effectively manage and improve channel sales on-the-go.
- Channel Managers can track overall channel sales and also easily manage partners, partner contacts, and related information.
- Partner role-based restriction features let you configure the app according to your business requirements.

Oracle Sales Assistant Chatbot

Integrate with the Oracle Sales Assistant chatbot to get these features:

- Oracle Sales Assistant helps salespeople perform their daily sales-related tasks. Using their phones, they can type or use your voice to ask questions, and the sales assistant retrieves the information or acts on the requests.
- Sales Assistant reduces manual data entry and makes it easier to view and update sales records using voice commands or typing.

> **Note:** If you need help enabling the Sales Assistant, send us a message on the *Sales Assistant forum* on Oracle Cloud Customer Connect.

New Design for Efficiency on the Go

Take advantage of these new design for efficiencies on-the-go:

- Modern and intuitive user experience, designed to boost productivity with fast and seamless interactions.
- At-a-glance record views for a quick grasp of summary, key, and related information.
- Access contextual actions everywhere for fast and easy record updates.
- Improved picker experience powered by Adaptive Search.

Global Search

These global search features make finding records efficient:

- Fast and simple search across all objects in one place.
- Use the multi-keyword search across multiple fields for faster and easier access to information.
- Search more easily with recent searches and type ahead results that display results as you type.
- Filter search results by object types.

New and Improved Sign-In Experience

This version of the mobile app has a new and improved sign-in experience:

- Scan a QR code to sign in easily using your single sign-on credentials or using basic authentication.
- Use face or fingerprint recognition to securely sign in to the app.
- View new configurations with fast download and instant activation of your configurations.
- Enable OAuth authentication token support to let users stay signed in to the app for longer.

Use a Phone or Tablet

Use either a phone or tablet to access the app. Using a tablet changes the display to 2x portrait mode.

Easy Configuration

Implement Mobile using these easy configuration aspects:

- Configure the app using the new interface designer.
- Create criteria for page layouts for both standard and custom objects.
- Download your configurations to the app quickly and easily. Mobile automatically signs you in to the correct sandbox without restarting the app.
- Create custom scripts that enforce custom validations and business logic for both top-level parent and child objects.

Use Offline

Salespeople can use Mobile in offline mode when they're not able to be online:

- View and edit Sales data in areas with no network connection.
- Sync automatically when a connection is re-established.

16 Account Data Enrichment and Verification

Two Services to Enrich and Verify Your Data and Save Salespeople Time

Perhaps nothing is more important for your sales effort than having up-to-date and actionable information about your customers and contacts and minimizing the time salespeople spend entering data. Oracle provides two services that enrich your customer data, improve its accuracy, and eliminate data entry time.

For account and contact information, you can obtain information on millions of companies worldwide by subscribing to the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B). A second service, Oracle Address, Email, and Phone Verification, ensures that you have the correct postal addresses, that your emails don't bounce, and your calls go through.

> **Note:** Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) is the new name for Data as a Service (DaaS).

Here's an overview of the 2 services:

Service	Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B)	Oracle Address, Email, and Phone Verification
Purpose	Account and contact search, enrichment, and prospecting.	Address, phone, and email address verification.
What It Does	Instead of entering data themselves when they create accounts, salespeople can look up the organizations they sell to from Dun & Bradstreet Corporation, one of the premier sources of business information. The service provides access to more than 347 million account records and more than 135 million contact records worldwide. Included is information about more than 90 different company attributes, including sales volume, growth data, hiring trends, competitors, and so on. Users can also filter the data by using over 60 company or contact attributes such as industry, revenue, company hierarchy, private or public indicator, contact title, contact department. The service also provides information about account hierarchies, showing the linkages between a corporation's subsidiaries, branches, and divisions. You can also schedule account or contact enrichment on thousands of records at the same time.	Salespeople can search and validate addresses in more than 248 countries using data from Loqate. They can verify addresses when creating or editing an account: correct misspellings, add missing elements (such as the postal code), and standardize elements (for example, changing "Drv" to "Dr"). You can also schedule address verification on thousands of records at the same time. The service automatically checks if phone numbers and email addresses exist and informs you if they're invalid. No more bounced emails or calls that don't go through.

Service	Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B)	Oracle Address, Email, and Phone Verification
	Oracle licenses account and contact enrichment separately. You subscribe to the Oracle Account Enrichment Cloud Service and the Oracle Contact Enrichment Cloud Service.	
How It Works	Salespeople start typing the account name, and the application suggests possible matches straight away. Selecting a match automatically fills in all the rest of the information. Salespeople can add contacts to accounts by job role. Selecting the Enrich action for existing accounts gets the latest information. The account and contact information continues to be updated automatically based on synchronization rules setup by your administrator.	Salespeople start typing the street address in the search field and the application starts suggesting possible matches. Selecting one of the suggestions fills in the rest of the address fields. You can also enable a Verify Address button that salespeople can use to verify addresses for a particular country. That's useful if you added nonstandard fields to the address or if salespeople don't always use the search field to look up an address. You can also verify and update addresses in bulk. The service informs salespeople if phone numbers and email addresses are invalid as soon as they enter them. They can also verify any existing ones to make sure they're still valid.
Setup	After you activate the service, and complete the simple setup described in this chapter in your sales application, salespeople can start looking up and enriching their data right away. To get the most out of the application, however, you must add fields to the UI to expose the additional information you're getting. While most of the information maps onto fields you can expose using Application Composer, you must create some custom fields to map the rest.	After you activate the service, and complete the simple setup described in this chapter in your sales application, salespeople can start looking up street addresses and verifying phone numbers and email addresses. In the Classic Sales (Classic UI), you can also expose the Verify Address button with a few extra steps.
Where to Get More Information	This guide includes the information you need to get started. You can get the full scoop in the Using Account and Contact Enrichment by Dun & Bradstreet guide.	This guide includes the information you need to get started. You can get the full scoop in the Using Oracle Address, Email, and Phone Verification guide.

Related Topics

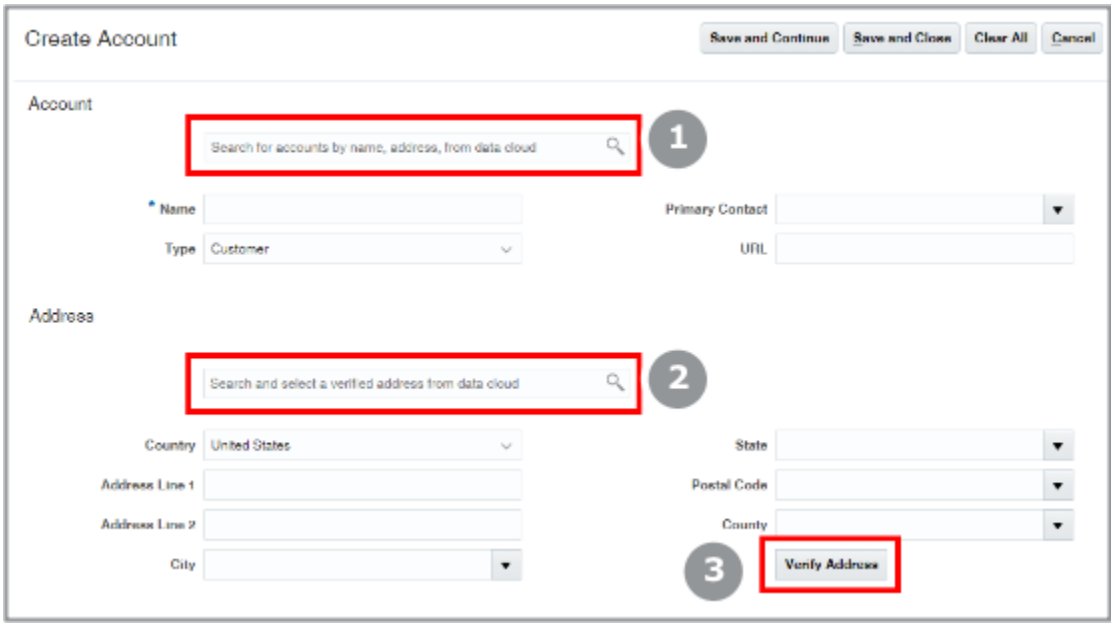
Enrichment and Verification You Can Start Using Right Away

After you complete the brief setup described in this chapter, salespeople can start enriching and verifying their customer data with two of the services: Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) and Oracle Address, Email, and Phone Verification. Additional fields and actions appear automatically in all of the appropriate create or edit account, lead, and contact pages. Here's a brief summary of how it works.

Saving Time Entering Accounts, Contacts, and Addresses

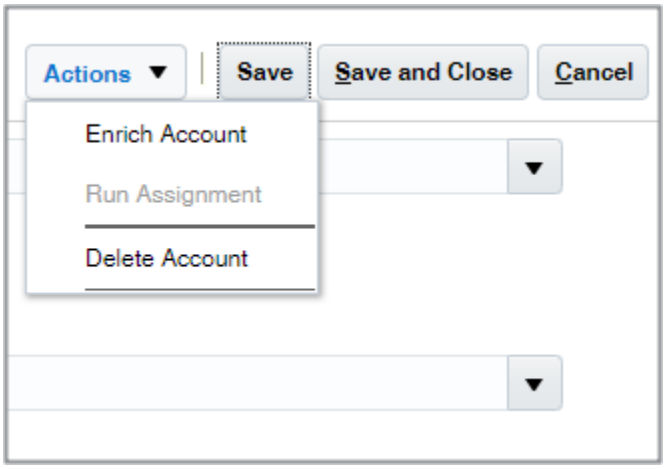
Salespeople can start saving time and improving accuracy while creating new accounts right away. Instead of entering data about an account themselves, they search for the account and address in new search fields, and the information is populated automatically. Here's a screenshot of the Classic Sales Create Account page with callouts highlighting the new UI elements.

Callout Number	New UI Element	Description
1	Account search	Salespeople search for accounts by name or by address and add them. The application suggests possible matches as soon as they start typing. Selecting an account populates the available company data.
2	Address search	Salespeople start typing an address and the service starts suggesting matching addresses. Selecting an address populates all of the address data.
3	Verify Address button	If you enable the optional Verify Address button, salespeople can verify an address that they enter in the Classic Sales UI or import from a file. You can enable this field with a few setups for Classic Sales UIs only. If salespeople use the address search consistently, they don't need the button.

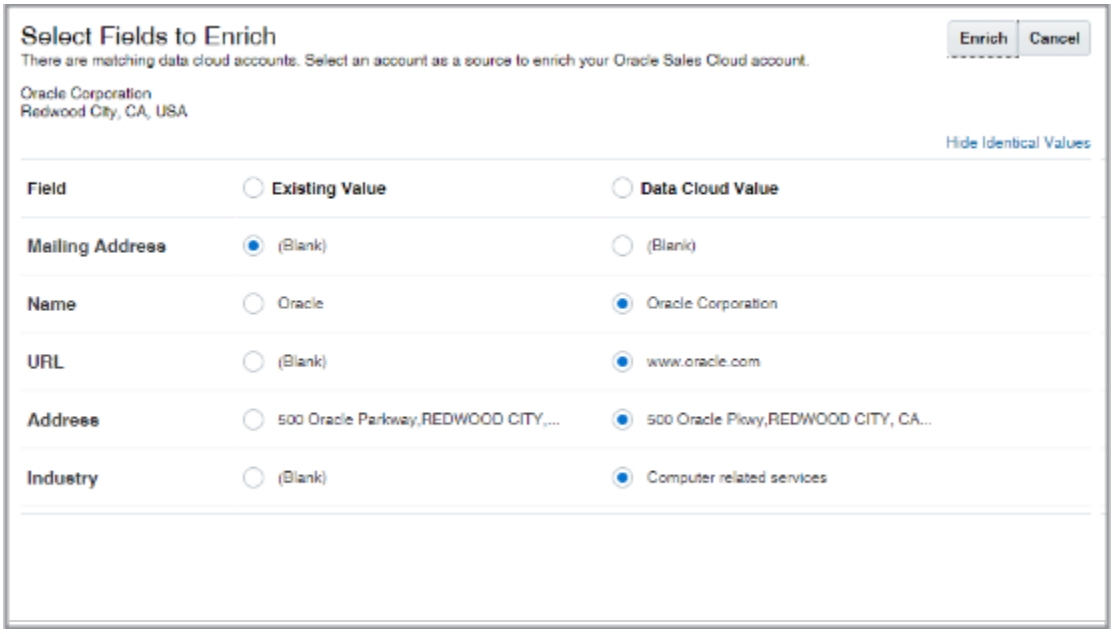


Enriching Existing Accounts

To enrich an existing account, salespeople use the **Enrich Account** action available in all the UI pages where you edit accounts. Here's a screenshot of the Actions menu in the Edit Account page.



When you enrich an account, you get to choose which fields to keep and which to replace.



If you're adding contacts to an account, you can add whole sets of contacts using criteria such as job category. You can also enrich multiple accounts and contacts at the same time on the landing page.

If you subscribe to Customer Data Management, you also have the option of enriching large batches of accounts and contacts in the Data Enrichment work area.

Email Address and Phone Number Verification

When you enter a phone number or an email address, the application automatically checks if they're valid. The application can't check if the phone numbers and emails you enter are valid for the specific person or account, of course, but it does assure that a phone number will actually dial and that an email won't bounce.

If the email or phone number you enter isn't valid, you get informed right away: the application displays the status right under the field. If nothing appears, your entry is valid. Here's a screenshot of a phone number to give you an idea of what appears under invalid information:

Callout Number	Description
1	Status. For phone numbers, this can be only **Invalid**. Email addresses can also display the status of **Partially-Valid**: the domain is valid but the name can't be verified. A Partially-Valid status for an email means that the complete email can't be verified by Loqate, but Loqate did validate the email domain. If the person left the company, or changed their name, you'll see the **Partially-Valid** status for the email, for example.
2	Date the email address or phone number was verified by the application.
3	Reverify button that you can use to verify again. You never know when area codes or email addresses may change. What's valid today may not be in 6 months.
4	Overwrite button to manually set the status. The application, isn't perfect. If you know that the number or email is correct, you can set the status to **Verified**. When you do, you see **Overwritten on** instead of **Verified on**.

Callout Number	Description

The application does display a **Valid** status, but only much later. By default, the status appears 180 days later. When the information is old, salespeople may want to verify it again by clicking on the Reverify button. You can specify the number of days before the Valid status appears or even turn this option off during setup. For details, see the topic: Enable the Verification of Addresses, Emails, and Phone Numbers.

Three Ways to Enrich Data

There are three ways to enrich account and contact data from the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) service:

- Real-time enrichment

  You can enrich data directly in the Account and Contact pages as described in this chapter.

  The real-time enrichment uses the REST APIs and the mapping you maintain using the Manage Oracle Data as a Service Attribute Mapping and Preferences task in the Setup and Maintenance work area.
- Manual enrichment

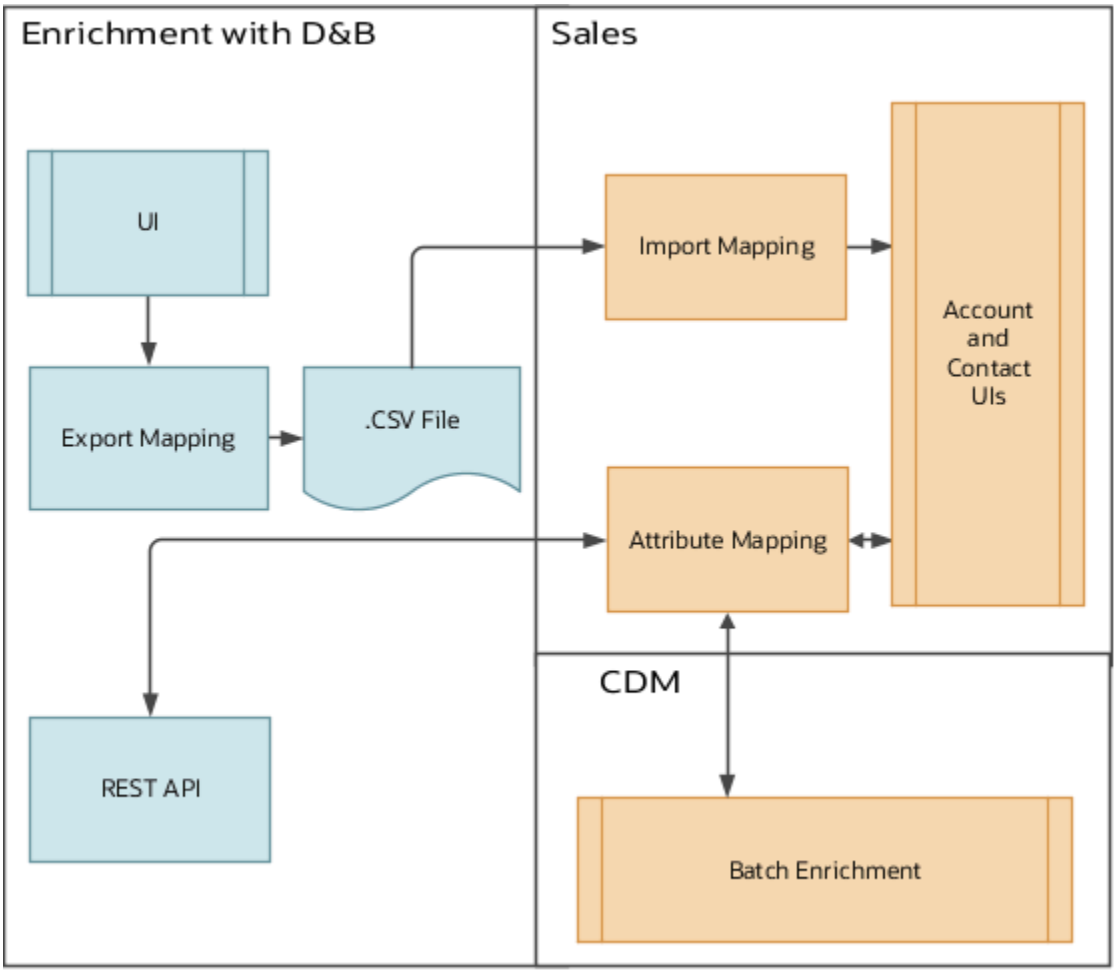
  You can do your sales prospecting in the D&B service UI, which provides more ways to filter and search. You then export your account or contact records into a file and import the file into your sales application.

  The D&B service includes a default export mapping you can edit. You can edit the import mapping in the sales application. The Using Account and Contact Enrichment by Dun & Bradstreet guide provides the details about the export and import mappings.
- Batch enrichment

  You can also enrich your account and contact data in bulk. Bulk enrichment uses the same REST APIs and mapping you maintain in Manage Oracle Data as a Service Attribute Mapping and Preferences. However, the integration doesn't support any additional custom fields you add.

Here's a diagram to illustrate the architecture:

- The D&B service includes the mapping you can use to export a file with accounts and contacts. Importing the file using Import Management into your sales application uses an import mapping.
- The real-time enrichment feature and Oracle Customer Data Management (CDM) both use the REST APIs and the mapping you can update in your sales application. The mapping determines which fields show up in the UI.



Overview of Data Enrichment and Verification Setup

This chapter outlines the process for setting up two Oracle cloud services that enrich and verify your account and contact data: Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) and Oracle Address, Email, and Phone Verification.

When your organization subscribes to Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) and Oracle Address, Email, and Phone Verification services, the person or people designated as the service administrators for your sales application domain or the account administrator, receive a welcome email. You must be one of the service administrators to complete the setup. If you don't receive the email, you can ask the account administrator to create you as a service administrator or resend the email. Here's a list of the setup tasks.

Before you start, you must complete the required setup in the Oracle Cloud Dashboard. See the Using Account and Contact Enrichment by Dun & Bradstreet guide for details.

Step	Applies To	Description	Navigation or Steps	Where to Get More Details
1	Both Classic Sales and Sales for Redwood	Enter the service URL, and the user name and password for a user with the role: DATASERVICE CLIENT API APPID, in two separate pages in Setup and Maintenance: • Manage Integration with Oracle Data as a Service • Manage Integration with Oracle Verification Services	**Setup and Maintenance** > **Sales** > **Integrations** > **Manage Integration with Oracle Data as a Service** **Setup and Maintenance** > **Sales** > **Integrations** > **Manage Integration with Oracle Verification Services**	See the topic: *Integrate the Account Enrichment and Verification Services*
2	Both Classic Sales and Sales for Redwood	Enable the UI verification for street addresses, email addresses, and phone numbers.	**Setup and Maintenance** > **Sales** > **Data Quality Verification Services** > **Quick Setup**	See the topic: *Enable the Verification of Addresses, Emails, and Phone Numbers*
3	Classic Sales	Optionally, you can enable a Verify Address button that salespeople can use in Classic Sales to verify addresses entered manually.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Geographies**	See the topic: *Enable the Verify Address Button*
4	Both Classic Sales and Sales for Redwood	Salespeople don't see all of the great account and contact information you enrich unless you expose additional fields in the UI. Some of the additional information you get from D&B is already mapped to existing sales account and contact fields. All you need to do is to use Application Composer to add these fields to the UI. For other attributes, you must create custom fields and add them to the mapping.	**Navigator** > **Configuration** > **Application Composer** **Setup and Maintenance** > **Sales** > **Accounts and Contacts** > **Show** > **Manage Oracle Data as a Service Attribute Mapping and Preferences**	See the topics: • *Add Enriched Fields to the Account and Contact Pages* • *Add Fields to the Mapping*
5	Both Classic Sales and Sales for Redwood	Specify if you are enriching accounts, contacts, or both and indicate enrichment preferences. This setup is done in the Preferences tab on the same Manage Oracle Data as a Service Attribute Mapping and Preferences page you used in the previous step.	**Setup and Maintenance** > **Sales** > **Accounts and Contacts** > **Show** > **Manage Oracle Data as a Service Attribute Mapping and Preferences**	See the topic: *Configure Enrichment Preferences*

Related Topics

Integrate the Account Enrichment and Verification Services

Here's how to integrate the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) and the Oracle Address, Email, and Phone Verification services in your sales application.

> **Note:** Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) is the new name for Data as a Service (DaaS).

Prerequisites

Before you start, you must:

- Set up the DaaS service in the Oracle Cloud Dashboard.
- Copy the URL of the DaaS instance.
- Provision a user with the DATASERVICE CLIENT API APPID role.
- Add each service as a confidential application in Oracle Identity Cloud Service as described in the topic "Add a Confidential Application" in the Administering Oracle Identity Cloud Service guide.

  On the Client page of the Add Confidential Application wizard, in the Authorization section, select **Resource Owner**, **Client Credentials**, **Authorization Code**, and **Refresh Token** as Allowed Grant Types. Leave Redirect URL blank. If you use Basic Authentication, do not include the question mark special character (?) in the password.

You must enter the URL and user name and password to complete the integration in the Setup and Maintenance work area.

Integrate the D&B Enrichment with Your Sales Application

1. In the Setup and Maintenance work area, open the **Manage Integration with Oracle Data as a Service** task:
   - Offering: Sales
   - Functional Area: Integrations
   - Show: All Tasks
   - Task: Manage Integration with Oracle Data as a Service
2. In the Manage Integration with Oracle Data as a Service page, select the **OAuth Authentication** option.
3. In the **URL** field, enter the URL of the DaaS instance. Remove `/data/ui` from the end of the URL. Here's an example: `https://mydataservice-myidentitydomain.data.us2.oraclecloud.com`.

   If you didn't save the URL, you can find it in the welcome email and in Oracle Cloud Dashboard.

4. In the **Client ID** and the **Client Secret** fields, enter the values you obtained when you added the service as a confidential application in Oracle Identity Cloud Service.
5. Click **Save and Close**.

Integrate the Address, Email, and Phone Verification with Your Sales Application

Enter the same information in the Manage Integration with Oracle Address Verification page:

1. In the Setup and Maintenance work area, open the task **Manage Integration with Oracle Verification Services**:
    - Offering: Sales
    - Functional Area: Integrations
    - Show: All Tasks
    - Task: Manage Integration with Oracle Verification Services
2. In the Manage Integration with Oracle Verification Services page, select the **OAuth Authentication** option.
3. In the **URL** field, enter the URL of the verification service instance. Remove `/data/ui` from the end of the URL. Here's an example: `https://mydataservice-myidentitydomain.data.us2.oraclecloud.com`.

   If you didn't save the URL, you can find it in the welcome email and in Oracle Cloud Dashboard.
4. In the **Client ID** and the **Client Secret** fields, enter the values you obtained when you added the service as a confidential application in Oracle Identity Cloud Service.
5. Click **Save and Close**.

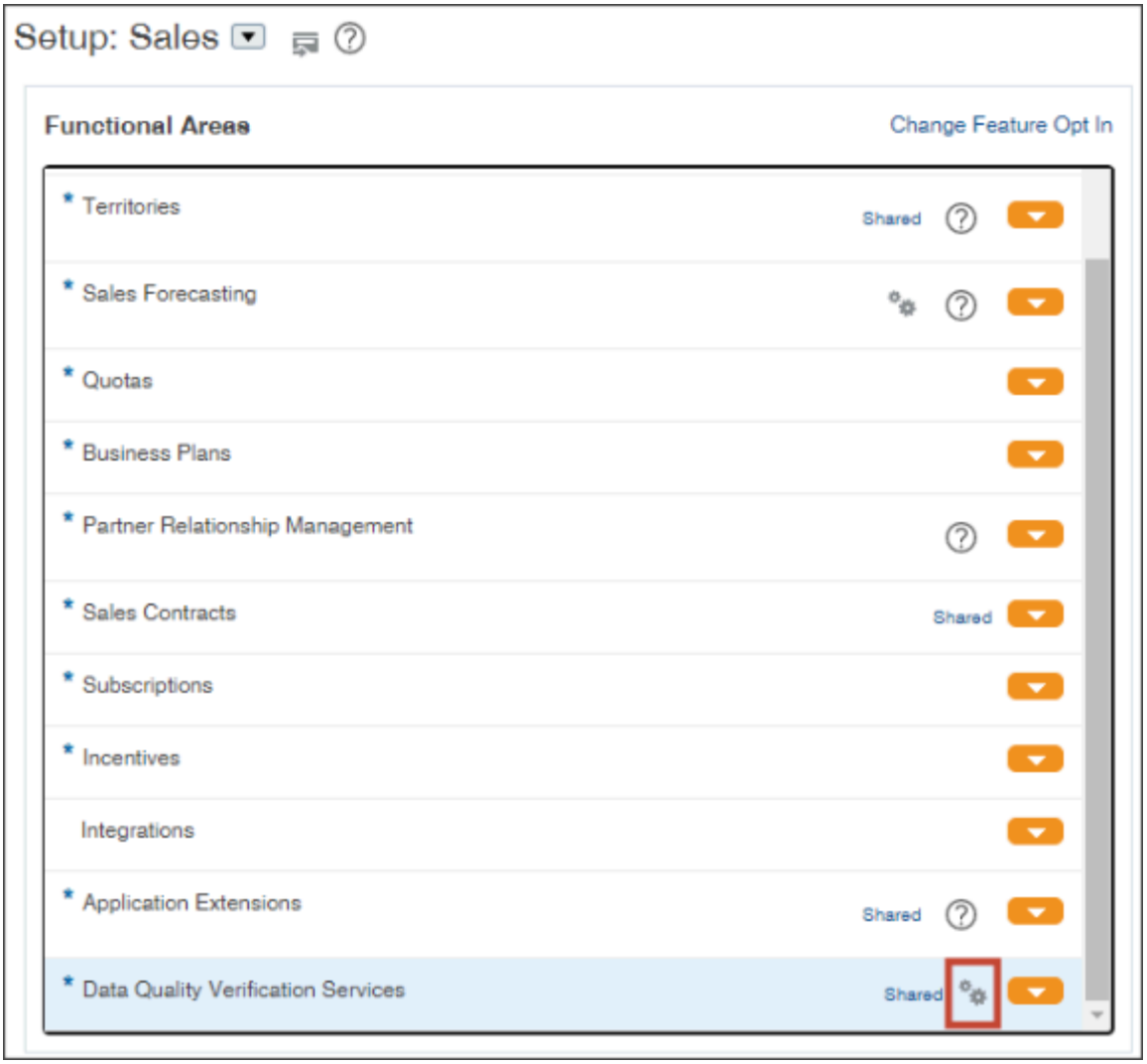
Related Topics

Enable the Verification of Addresses, Emails, and Phone Numbers

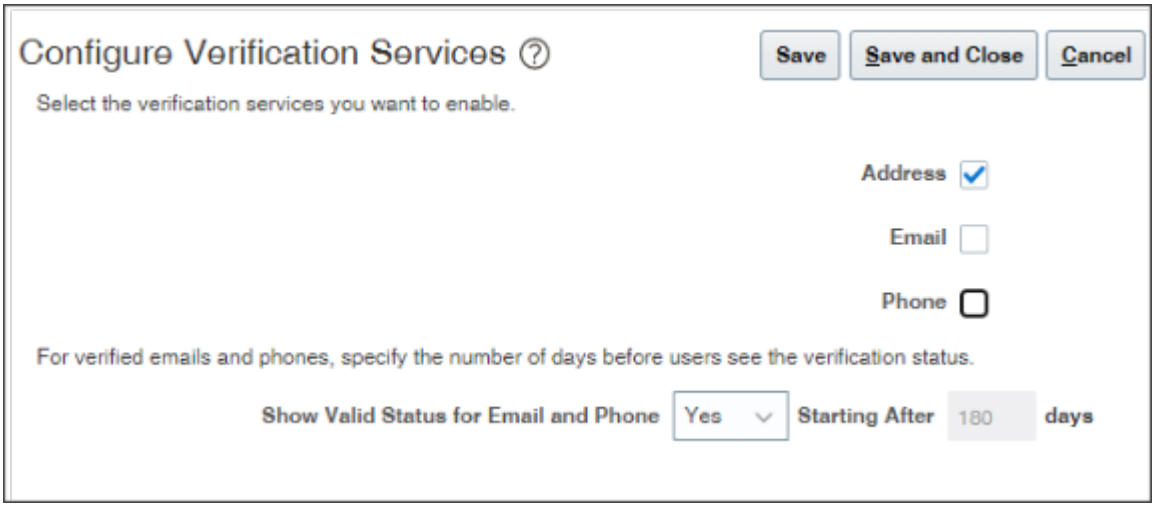
After you enter the integration information, you enable the verification services that you want to use. Here's the easiest way, using the Quick Setup page provided for this purpose:

1. In the Setup and Maintenance work area, open the **Sales** offering.

2. In the Functional Areas section, the left pane of the page, scroll down to the **Data Quality Verification Services**, and click **Quick Setup** (the gears icon highlighted in the screenshot).



3. In the Configure Verification Services page, select the verification services you want to enable. Address is enabled by default.



4. Using **Show Valid Status for Email and Phone** field, you can specify if and when users see the status of Valid for verified phone numbers and emails.

   Users see right away if the email address or phone number they enter are invalid, but they don't see a Valid status until later. By default, the Valid status displays after 180 days. Displaying the status makes it possible for users to verify the information again. In 6 months, the contact may be gone; the number may have changed.

   a. To enable or disable the display of the Valid status, select **Yes** or **No**.
   b. If you selected **Yes**, then enter the number of days before users see the Valid status.

5. Click **Save and Close**.

Note: Using the Quick Setup page is the equivalent of setting the following profile options using the Manage Administrator Profile Values task:

- Email Verification Service Enabled (ORA_ZCH_EMAIL_VERIFICATION)
- Phone Verification Service Enabled (ORA_ZCH_PHONE_VERIFICATION)
- Phone and Email Status Validity (ORA_ZCH_PHONE_EMAIL_STATUS_VALIDITY)

Related Topics

- Enrichment and Verification You Can Start Using Right Away
- Integrate the Account Enrichment and Verification Services
- How do I verify email addresses and phone numbers?

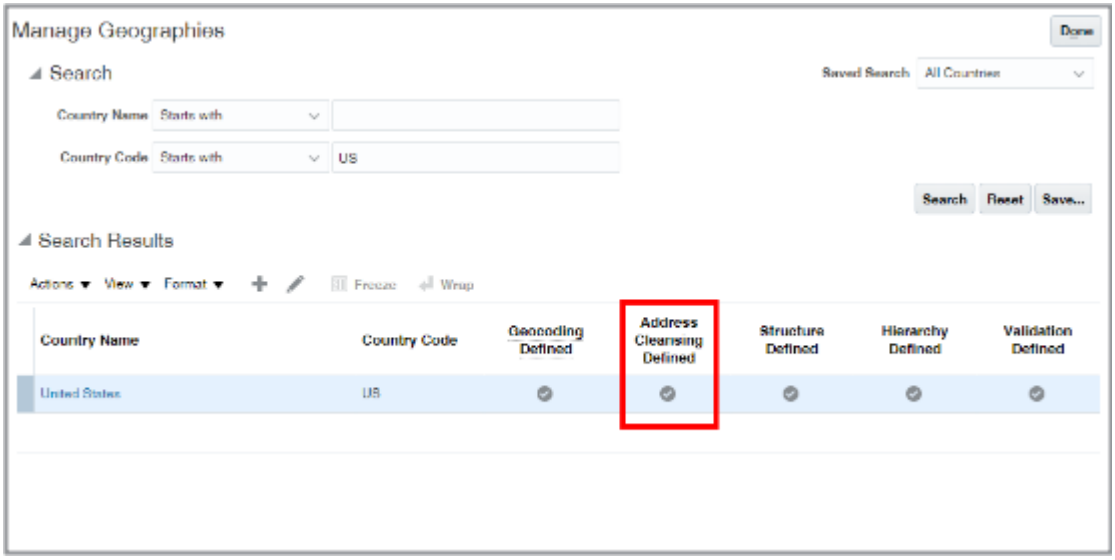
Enable the Verify Address Button

If your salespeople are diligent in using the search field to enter addresses, you can skip this step. Addresses added using search are already verified. The Verify Address button is only useful if you want to check that the accuracy of addresses entered manually or if you imported unverified addresses. You can enable the button only for countries you imported earlier.

Repeat these steps for each of the countries where you want the button. You can only enable the button for country geographies you imported.

1. Open the **Manage Geographies** task from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Geographies
2. On the Manage Geographies page, search for each country you imported using either its name or its two letter ISO code. For example, enter either United States or US, and click **Search**.
3. Select the country in the Search Results area.
4. Click **Go to Task** (the circular icon) in the **Address Cleansing Defined** column.

    Here's a screenshot of the Manage Geographies page highlighting the Go to Task icon and the Address Cleansing column.



5. In the Address Cleansing Level window, select Optional for Real-Time Address Cleansing Level.

6. Click **Save and Close**.

Add Enriched Fields to the UI

Review the List of Additional Account and Contact Attributes

Review the list of mapped and unmapped account and contact information you can expose in the UI. You can expose the mapped fields in the UI using Application Composer. For the unmapped fields, you must first create a custom field for it in the sales application and add the field to the mapping.

Mapped Account Fields

You can expose any of the fields listed in the table in the account pages using the display name. Long field names aren't always completely visible in Application Composer, but you can hover over a display name to see the underlying technical name.

The table lists the name of the Oracle Account Enrichment attribute in the first column, and provides a brief definition and description. The Account Field Display Name field lists the display name in the UI and in Application Composer. The Account Field Name lists the technical name. The names don't always match.

Oracle Account Enrichment Attribute	Definition	Description	Account Field Display Name	Account Field Name
Data/DataCloudStatus	Data Cloud Status	Indicates if the record has been matched.	Enrichment Status	DataCloudStatus
Data/ PrefFunctionalCurrency	Currency	A code value that describes the type of currency in which the sales volume (local currency) is expressed.	Preferred Functional Currency	PrefFunctionalCurrency
Data/ CurrFyPotentialRevenue	Sales Volume (Local currency)	The total annual sales revenue in US dollars as a signed, decimal field. If the revenue is collected in local currency, then the local value is converted to US dollars.	Current Fiscal Year's Potential Revenue	CurrFyPotentialRevenue
Data/ DomesticUltimateDunsNum	Domestic Ultimate DUNS Number	A subsidiary within the global family tree that is the highest-ranking member within a specific country. May contain leading zeros, which will be lost if the field is treated as numeric.	Domestic Ultimate D-U-N-S Number	DomesticUltimateDunsNumC
Data/DunsNumberC	DUNS Number	A randomly generated 9-digit number assigned by Dun & Bradstreet Corporation to identify	D-U-N-S Number	DunsNumberC

Oracle Account Enrichment Attribute	Definition	Description	Account Field Display Name	Account Field Name
		unique business establishments. May contain leading zeros, which will be lost if the field is treated as numeric.		
Data/GlobalUltimateDunsNumC	Global Ultimate DUNS Number	The top-most responsible entity within the corporate family tree. May contain leading zeros, which will be lost if the field is treated as numeric.	Global Ultimate D-U-N-S Number	GlobalUltimateDunsNumC
Data/ParentDunsNumC	Parent DUNS Number	The D-U-N-S number of the parent organization. May contain leading zeros, which will be lost if the field is treated as numeric.	Parent D-U-N-S Number	ParentDunsNumC
Data/EmpAtPrimaryAdrEstInd	Number of Employees (This Site)	The number of employees at this location.	Employees at Identifying Address	EmployeesAtPrimaryAddressText
Data/EmpAtPrimaryAdrEstInd	Employees Here Reliability Code	Describes the reliability of the Employees Total value.	Number of Employees at Identifying Address	EmployeesAtPrimaryAddress
Data/EmpAtPrimaryAdrMinInd	Employees Primary Minimum Indicator	A code value that describes the reliability of the Employees Total value.	Number of Employees at Identifying Primary Address Minimum	EmployeesAtPrimaryAddressMinimum
Data/EmployeesTotal	Employees Total	The total number of employees in the business organization; it should include subsidiary and branch locations.	Number of Employees	EmployeesTotal
Data/TotalEmpEstInd	Employees Total Reliability Code	Describes the reliability of the Employees Total value. The possible values are: Actual, Estimated, and blank.	Number of Employees Estimated Qualifier	TotalEmployeesEstimatedIndicator
Data/TotalEmpMinInd	Employees Total Minimum Indicator	Displays the reliability of the Employees Total value. The possible values are: Includes Subsidiaries, Subsidiaries not included, and blank.	Number of Employees at Identifying Address Minimum Qualifier	TotalEmployeesMinimumIndicator
Data/ImportInd	Import Indicator	A code value that identifies whether the business imports goods or services	Importer Indicator	ImportInd

Oracle Account Enrichment Attribute	Definition	Description	Account Field Display Name	Account Field Name
		for remanufacture or sale, exports products or services to a foreign country, or is an agent for goods.		
Data/ExportInd	Export Indicator	A code value that identifies whether the business imports goods or services for remanufacture or sale, exports products or services to a foreign country, or is an agent for goods.	Exporter Indicator	ExportInd
Data/LegalStatusCode	Legal Status Code	A code value that describes the legal structure of the business.	Legal Status	LegalStatusCode
Data/LineOfBusiness	Line of Business	A description of the operations or activities of the business. Relates to the primary four-digit 1987 US SIC.	Line of Business	LineOfBusiness
Data/MinorityOwnedInd	Minority Owned Indicator	Whether or not the business is owned by a member of a minority group.	Minority-Owned Indicator	MinorityOwnedInd
Data/MinorityOwnedType	Minority Owned Type	Indicates the ethnicity of the minority holding an ownership interest.	Type of Minority-Owned Organization	MinorityOwnedType
Data/RentOwnInd	Owns Rents Code	A code value that indicates if the business owns or rents the building it occupies.	Rent or Own Indicator	RentOwnInd
Data/ PublicPrivateOwnershipFlag	Public Private Indicator	Whether or not ownership of the business is public or private.	Private Ownership	PublicPrivateOwnershipFlag
Data/SmallBusInd	Small Business Indicator	Indicates if the business meets SBA certification eligibility criteria effective July 1, 1999. All firms must be certified by one of the Small Disadvantaged Business Certification Agencies.	Small Business Indicator	SmallBusInd

Oracle Account Enrichment Attribute	Definition	Description	Account Field Display Name	Account Field Name
Data/ParentSubInd	Subsidiary Status	Whether or not the subject business is more than 50-percent owned by another organization.	Subsidiary Indicator	ParentSubInd
Data/YearStarted	Year Started	The year when the current ownership or management assumed control of the business or the year established if no control change has taken place. This is not provided for branch records.	Year Established	YearEstablished
Data/LocationType	Location Type	A code value that describes the organizational status of the business; for example, Single Location, Headquarters, Branch.	HQ Branch Indicator	HQBranchIndicator
Data/FederalTaxIDNumber	Federal Tax ID Number	A number assigned by the Internal Revenue Services (IRS) that either uniquely identifies or helps to identify a subject, also referred to as Federal Taxpayer Identification Number.	Taxpayer Identification Number	JgzzFiscalCode
Data/PrimaryAddressLine1	Street Address 1	The first street address line where a business is physically located. Generally in local language.	Address Line 1	PrimaryAddressLine1
Data/PrimaryAddressLine2	Street Address 2	The second street address line where a business is physically located. Generally in local language.	Address Line 2	PrimaryAddressLine2
Data/PrimaryCity	City	City where the business is located. Generally in local language.	City	PrimaryAddressCity
Data/PrimaryCounty	County	The full name of the county where the business is located.	County	PrimaryAddressCounty
Data/PrimaryState	State	The full name of the state where the business is located.	State	PrimaryAddressState

Oracle Account Enrichment Attribute	Definition	Description	Account Field Display Name	Account Field Name
Data/PrimaryPostalCode	OSC Postal Code	The 5-digit postal code where the business is physically located.	Postal Code	PrimaryAddressPostalCode
Data/PrimaryCountry	Country	The 2-byte alpha character ISO code for the country where the business is located.	Country	PrimaryAddressCountry
Data/RawPhoneNumber	Phone Number	The primary phone number for the business with no formatting or punctuation. This string contains all telecommunication number components (area code, exchange, number).	Primary Phone Number	PrimaryPhoneNumber
Data/ FaxRawPhoneNumber	Facsimile Number	The primary facsimile number for the business with no formatting or punctuation. This string contains all telecommunication number components (area code, exchange, number).	Fax	Fax
Data/Url	Url	The primary URL for the company.	URL	PrimaryURL
Data/WomanOwned	Woman Owned	A business that is at least 51-percent owned by, and whose management and daily business operations are controlled by, a woman.	Woman-Owned Indicator	WomanOwnedInd

Unmapped Account Fields

You must create a text or a number field for these attributes and add them to the mapping before you can expose the field in the account pages.

The table lists the name of the attribute on the mapping page in the first column, and provides a brief definition and description. The Geographical Availability column indicates if the attribute is available for all countries or just a subset.

Oracle Account Enrichment Attribute	Definition	Description	Geographical Availability
Data/State Name	State Name	The full name of the physical state or province name where the business is located.	Global

Oracle Account Enrichment Attribute	Definition	Description	Geographical Availability
Data/PrimaryFullPostalCode	Full Postal Code	Full postal code as received by Dun & Bradstreet Corporation.	Global
Data/LatitudeShort	Latitude Short	The angular distance north or south from the earth's equator measured through 90 degrees. Note: This is a less granular view of the Latitude field.	Canada, Germany, UK, US, Mexico, Vietnam, Belgium, Australia, Netherlands, Republic of Korea
Data/LongitudeShort	Longitude Short	The angular distance east or west from the prime meridian measured through 180 degrees. Note: This is a less granular view of the Longitude field.	Canada, Germany, UK, US, Mexico, Vietnam, Belgium, Australia, Netherlands, Republic of Korea
Data/MailingFullPostalCode	Mailing Full Postal Code	Full postal code as received by Dun & Bradstreet Corporation.	Global
MetaData/MatchScore	Match Score	A score representing the likelihood of a match between records.	Global
Data/CompanyDescription	Company Description	Narrative company description.	Global
Data/MarketableIndicator	Marketability Indicator	Indicates that the record satisfies Dun & Bradstreet Corporation global marketability rules.	Global
Data/GEOCodeAccuracy	GEO Code Accuracy	A code value that describes how close the coordinates for a location are to a rooftop level.	Global
Data/ SalesVolume(USDollars)ReliabilityCode	Sales Volume (US Dollars) Reliability Code	A code value that describes the reliability of the annual sales/ revenue figure that is expressed in US dollars.	Global
Data/SalesVolume(LocalCurrency)	Sales Volume US Dollars	The total annual sales revenue for this business in local currency. Not available on branch locations.	Global
Data/ SalesVolumeLocalCurrencyReliabilit	Sales Volume Local Currency Reliability Code	A code value that describes the reliability of the annual sales/ revenue figure that is expressed in local currency.	Global
Data/ DomesticUltimateBusinessName	Domestic Ultimate Business Name	The primary name of the domestic ultimate business.	Global

Oracle Account Enrichment Attribute	Definition	Description	Geographical Availability
Data/DomesticUltimateFIPSCountryCode	Domestic Ultimate FIPS Country Code	The Federal Information Processing Standards code value that identifies the country where the domestic ultimate company is located.	Global
Data/DomesticUltimateD&BCountryCode	Domestic Ultimate D&B Code	Dun & Bradstreet Corporation geographical code identifying the country where the domestic ultimate is located.	Global
Data/DomesticUltimateState/ProvinceAbbreviation	Domestic Ultimate State Province Abbreviation	The abbreviated name of the state or province in which the domestic ultimate is located.	Global
Data/GlobalUltimateBusinessName	Global Ultimate Business Name	The name of the ultimate company.	Global
Data/GlobalUltimateIndicator	Global Ultimate Indicator	Indicates whether the site record is the Global Ultimate D-U-N-S within the corporate family tree.	Global
Data/GlobalUltimateFIPSCountryCode	Domestic Ultimate FIPS Country Code	The Federal Information Processing Standards code value that identifies the country where the domestic ultimate company is located.	Global
Data/GlobalUltimateD&BCountryCode	Domestic Ultimate D&B Country Code	Dun & Bradstreet Corporation geographical code identifying the country where the domestic ultimate is located.	Global
Data/GlobalUltimateState/ProvinceAbbreviation	Global Ultimate State Province Abbreviation	The abbreviated name of the state or province in which the global ultimate is located.	Global
Data/HeadquarterDUNSNumber	Headquarter DUNS Number	The D-U-N-S number of the headquarter organization. May contain lead zeros, which will be lost if field is treated as numeric.	Global
Data/Parent/HeadquarterBusinessName	Parent Headquarters Business Name	The primary name of the parent headquarters company.	Global
Data/HierarchyCode	Hierarchy Code	A number used with the status and subsidiary indicators to pinpoint the location of an establishment within a corporate hierarchy. The hierarchy on the global ultimate is '01'. A branch hierarchy is the same	Global

Oracle Account Enrichment Attribute	Definition	Description	Geographical Availability
		as its headquarters'. A subsidiary's hierarchy is one more than its parent's.	
Data/NumberofFamilyMembers	Number of Family Members	The number of family members including the global ultimate and all subsidiaries and branches of the entire family tree worldwide. All family members within a particular tree carry the same count.	Global
Data/OutofBusinessIndicator	Out of Business Indicator	Indicates that the business is out of business or inactive based upon D&B policies and procedures.	US only
Data/ OvertheCounterStockExchange	Over the Counter Stock Exchange	The symbol used to trade the company's stock on the Over the Counter Stock Exchange.	US only
Data/NYSEStockExchange	NYSE Stock Exchange	The symbol used to trade the company's stock on the New York Stock Exchange.	US only
Data/ASETicker	ASE Ticker	The symbol used to trade the company's stock on the American Stock Exchange.	US only
Data/NMSTicker	NMS Ticker	The symbol used to trade the company's stock on the NASDAQ National Market.	US only
Data/NASTicker	NAS Ticker	The symbol used to trade the company's stock on the NASDAQ Small Cap Exchange.	US only
Data/ OperatesFromResidenceIndicator	Operates From Residence Indicator	Operates From Residence Indicator	US only
Data/PrimaryCompetitor1	Primary Competitor 1	DUNS number of the company deemed to be the primary competitor for the business.	Global
Data/3YearGrowthPercentageonSal	3 Year Growth Percentage on Sales Volume	The percentage increase or decrease in the sales volume over a three-year period. Includes a plus (+) or minus (-) sign denoting positive or negative growth in sales.	US only
Data/3YearGrowthPercentageonEm	3 Year Growth Percentage on Employees	The percentage increase or decrease in the number of	US only

Oracle Account Enrichment Attribute	Definition	Description	Geographical Availability
		employees over a three-year period. Includes a plus (+) or minus (-) sign denoting positive or negative growth in sales.	
Data/DeliquencyRisk	Delinquency Risk	Based on the standard Commercial Credit Score, which predicts the likelihood of a company becoming severely delinquent over the next 12 months. Grouped into risk ranges.	US only
Data/CensusFIPSTerritoryCode	Census FIPS Territory Code	The Federal Information Processing Standards territory code for where this subject is located. These territory codes are defined and developed by the National Institute of Standards and Technology (NIST) organization within the US federal Department of Commerce.	US only
Data/CensusFIPSCountyCode	Census FIPS Country Code	The Federal Information Processing Standards county code identifying the county where the subject is located.	US only
Data/PrimaryCompetitor2	Primary Competitor 2	DUNS number of the company deemed to be the second primary competitor for the business.	Global
Data/PrimaryCompetitor3	Primary Competitor 3	DUNS number of the company deemed to be the third primary competitor for the business.	Global
Data/SecondaryCompetitor1	Secondary Competitor 1	DUNS number of the company deemed to be the secondary competitor for the business.	Global
Data/SecondaryCompetitor2	Secondary Competitor 2	DUNS number of the company deemed to be the secondary competitor for the business.	Global
Data/GlobalExchangeName	Global Exchange Name	The exchange where the stock symbol is listed.	Global
Data/PrimaryIndicator	Primary Indicator	Indicates whether or not the ticker is the primary one for the business.	Global
Data/NationalIdentificationCode	National Identification Code	A code value that describes the type of national ID number	Global

Oracle Account Enrichment Attribute	Definition	Description	Geographical Availability
		provided; for example, '12' = CRO, '14' = Siren.	
Data/FIPSMSACode	FIPS MSA Code	The Federal Information Processing Standards code value, which identifies the Metropolitan Statistical Area (known as the MSA) where this subject is located. These MSA codes were defined and developed by the National Institute of Standards and Technology (NIST) organization within the US Federal Department of Commerce.	US only
Data/ ParentHeadquarterD&BCountryCod	Parent Headquarters D&B Country Code	Dun & Bradstreet Corporation geographical code identifying the country where the parent headquarters are located.	Global

Mapped Contact Fields

You can expose any of the fields listed in the table in the contact pages using the display name. Long field names aren't always completely visible in Application Composer, but you can hover over a display name to see the underlying technical name.

The table lists the name of the attribute on the mapping page in the first column, and provides a brief definition and description. The Contact Field Display Name field lists the display name in the UI and in Application Composer. The Contact Field Name lists the technical name. The names don't always match.

Oracle Contact Enrichment Attribute	Definition	Description	Contact Field Display Name	Contact Field Name
Data/DataCloudStatus	Data Cloud Status	The status of the record. Example: Matched.	Enrichment Status	DataCloudStatus
Data/ PersonPreNameAdjunct	Prefix	The prefix (Mr., Ms., Dr.) associated with the person's name.	Prefix	PersonPreNameAdjunct
Data/PersonFirstName	First Name	The first name of the person.	First Name	PersonFirstName
Data/PersonMiddleName	Middle Name	The middle name of the person.	Middle Name	PersonMiddleName
Data/PersonLastName	Last Name	The last name of the person.	Last Name	PersonLastName
Data/JobTitle	Title	The title associated with the person's role. This is the	Job Title	JobTitle

Oracle Contact Enrichment Attribute	Definition	Description	Contact Field Display Name	Contact Field Name
		title as it would read on a person's business card.		
Data/PersonNameSuffix	Suffix	The last name suffix of the person.	Suffix	PersonNameSuffix
Data/Address1	Street Address 1	The first street address line where a business is physically located. Generally in local language.	Address Line 1	PrimaryAddressLine1
Data/City	City	City where the business is located. Generally in local language.	City	PrimaryAddressCity
Data/State	State	The abbreviation for the physical state or province name where the business is located.	State	PrimaryAddressState
Data/PostalCode	OSC Postal Code	The 5-digit postal code where the business is physically located.	Postal Code	PrimaryAddressPostalCode
Data/Country	Country	The 2-byte alpha character ISO code for the country where the business is located.	Country	PrimaryAddressCountry
Data/ PhoneRawPhoneNumber	Direct Dial Phone	The direct-dial phone number associated with this person in this role. It includes country code, area code and phone number.	Phone Number	PrimaryFormattedPhoneNumber
Data/CompanyPhone	Company Phone	The company phone number at which the professional can be reached (for current role assignments).	Phone Number	PrimaryPhoneNumber
Data/PhoneExtension	Company Phone Extension	This is the phone extension associated with the company phone number indicated on this record.	Phone Extension	PrimaryPhoneExtension
Data/EmailAddress	Email Address	The main email address associated with this person's role or contact record.	Email	Email

Oracle Contact Enrichment Attribute	Definition	Description	Contact Field Display Name	Contact Field Name
Data/Department Department	Department	A division of a large organization such as Executive, Administration, and so on.	Department	Department

Unmapped Contact Fields

You must create a text or a number field for these attributes and add them to the mapping before you can expose the field in the contact pages.

The table lists the name of the attribute on the mapping page in the first column, and provides a brief definition and description. The Geographical Availability column indicates if the attribute is available for all countries or just a subset.

Oracle Contact Enrichment Cloud Service Attribute	Definition	Description	Geographical Availability
Data/FullPostalCode	Full Postal Code	Full postal code as received by Dun & Bradstreet Corporation.	Global
DataDUNSNumber	DUNS Number	The D-U-N-S number of the business location.	Global
Data/IndividualID	Individual ID	The unique identifier of the professional.	US only
Data/RoleID	Role ID	Unique identifier of the professional's job at a particular DUNS location.	US only
Data/LastUpdateDateRole	Last Update Date Role	The date any of the role data was last updated.	Global
Data/ManagementLevel	Management Level	Level of management; for example, C-Level, VP-Level, and so on.	Global
Data/StandardizedTitle	Standardized Title	A business title derived from the Management Responsibility Code, which identifies a title or area of responsibility of an executive.	Global
MetaData/MatchScore	Match Score	A score representing the likelihood of a match between records.	Global
Data/Location	Location	Address information for individual.	US only

Create the Fields for Any Unmapped Information

Here's an outline of how you can create text and number fields for any of the unmapped information that you want to display in the UI. You can get more details about creating fields in the Oracle Applications Cloud Configuring Applications Using Application Composer guide.

1. Ensure that you're working in a sandbox.
2. Click **Navigator** > **Configuration** > **Application Composer**.
3. Make sure **CRM Cloud** is selected in the **Application** field and expand **Standard Objects**.
4. Expand **Account** or **Contact**.
5. Click **Fields**.
6. In the Custom tab, click the **Create a custom field** icon.
7. Select **Text** or **Number** and click **OK**.
    - Here are the guidelines for creating a text field:

Property	Description
Display Label	Enter the text users see.
Display Width	Character width for the text field. The default is 30.
Display Type	Determines the type of text field displayed to the users. You can choose Simple Text Box that is a single-line text field, or Multiline Text Area, a larger text area that spans multiple lines.
Name	The unique identifier for the field that you add to the mapping. The application enters a name for you, but it's a good idea to change the name to match the field you're mapping.
Description	Optional description of the object. This field is used for internal purposes.
Required	Leave deselected. The field isn't required.
Updatable	Leave selected.
Searchable	Indicates whether to make the field available for selection as additional search criteria in the Add Fields list in Advanced Search mode.
Depends On	Leave blank.
Fixed Value	Leave selected and blank.

Property	Description

- Here are the guidelines for creating a number field:

Property	Description
Display Label	Enter the text users see.
Display Width	Leave blank.
Name	The unique identifier for the field that you add to the mapping. The application enters a name for you, but it's a good idea to change the name to match the field you're mapping.
Description	Optional description of the object. This field is used for internal purposes.
Required	Leave deselected. The field isn't required.
Updatable	Leave selected.
Searchable	Indicates whether to make the field available for selection as additional search criteria in the Add Fields list in Advanced Search mode.
Indexed	Indexing a field for search improves search performance.
Maximum Length	Leave the default value.
Minimum Value	Leave blank.
Decimal Places	Leave at 0.
Depends On	Leave blank.
Fixed Value	Leave selected and blank.

8. Click **Save and Close**.

Add Enriched Fields to the Account and Contact Pages

Here's how to add enriched fields to the Profile tab in the Edit Account and Edit Contact pages in Classic Sales. You can use the same process to add the fields to other Classic Sales pages as well.

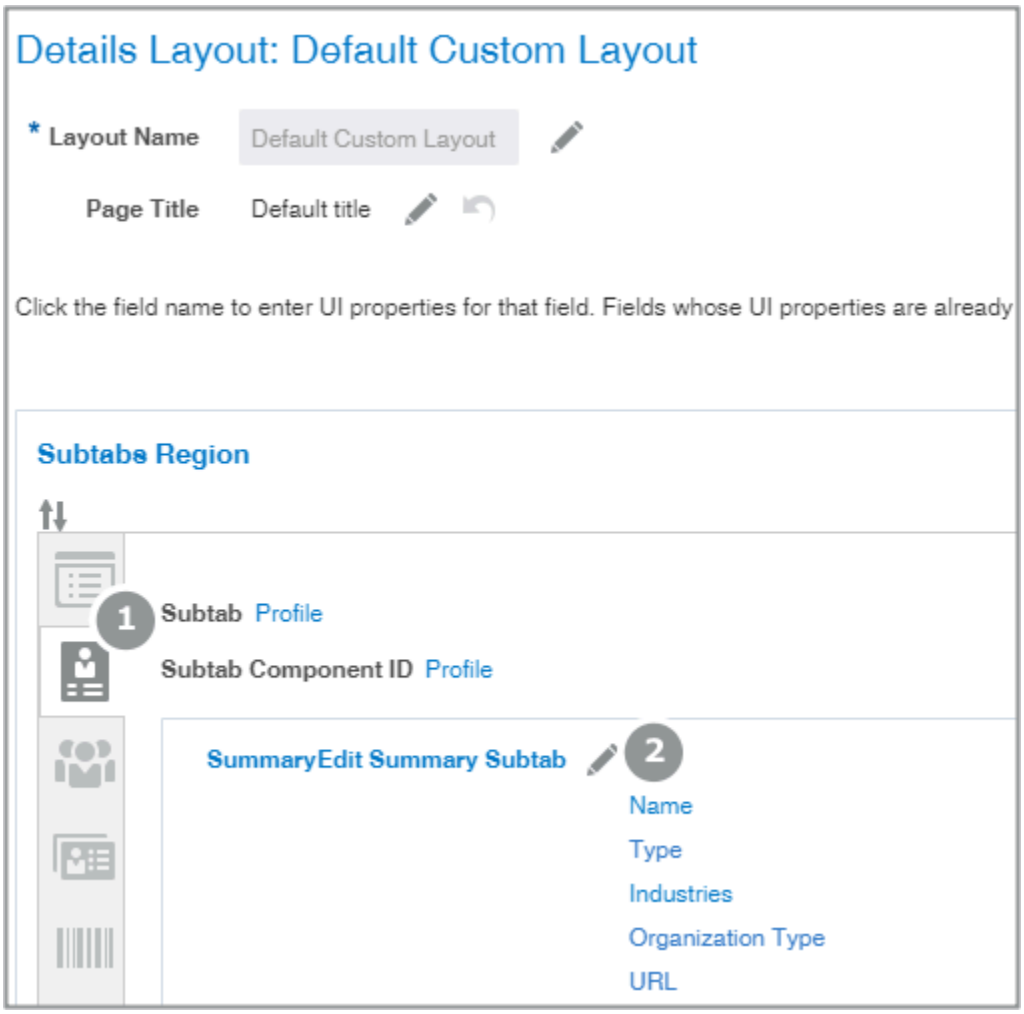
If you're adding the fields to the Sales for Redwood UIs, then you must use VB Studio instead of Application Composer and follow the example topic, "Add a Custom Field to the Edit Contact Page", in the Oracle Fusion Cloud Sales Automation Extending Sales for Redwood.

1. Create and activate a sandbox.
2. Navigate to **Configuration** > **Application Composer**.
3. With the **Account** or **Contact** object selected in Application Composer, click **Pages**.

4. Expose the field on the Profile tab on the Edit Account or Edit Account page.

   Note: The "Edit" pages are called "Details" pages in Application Composer.

   a. Scroll to locate the Details Page Layouts and open a custom layout or create one by duplicating the default layout.
   b. Click the **Profile** subtab (callout 1 in the screenshot).
   c. In the Summary Subtab section, click **Edit** (callout 2).



   d. Scroll down in the **Available Fields** column to locate the field and move it to the **Selected Fields** column.
   e. Use the arrow buttons to move the field where you want it
   f. Click **Save and Close**.

      You are returned to the Layout page, which reflects your changes.
   g. Click **Done**.

      You are returned to the Application Composer page.

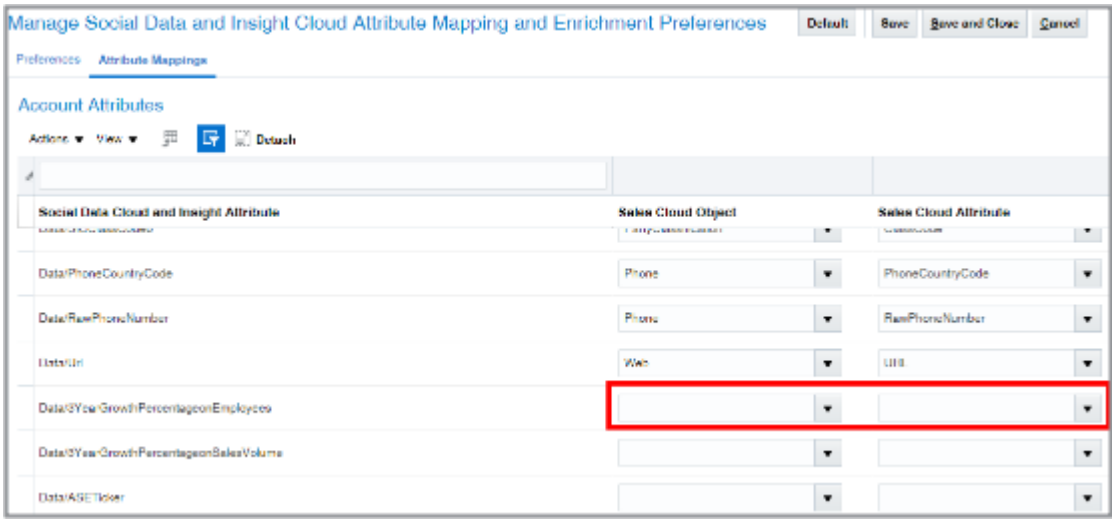
5. Review the pages where you added the fields:
    a. With the sandbox still open, click **Home**.
    b. Open the Account or Contact work area.
    c. Review each of the pages to make sure the fields are where you want them.
6. Publish the sandbox.

Add Fields to the Mapping

Here's how to add fields to the mapping:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Accounts and Contacts
    - Show: All Tasks
    - Task: Manage Oracle Data as a Service Attribute Mapping and Preferences
2. Click the **Attribute Mappings** tab.

    On the Attribute Mappings tab, there are two sections: Account Attributes and Contact Attributes.
3. In the appropriate section, find the field you want to map in the **Social Data Cloud and Insight Attribute** column.



4. In the **Sales Cloud Object** column, select **Account** from the list.
5. In the **Sales Cloud Attribute** column, select the sales field you want to map.
6. When you complete mapping all of the fields, click **Save and Close**.

Configure Enrichment Preferences

Specify if you want to enable enrichment of accounts, contacts, or both, and configure enrichment preferences to define what data is updated in an enriched account or contact.

CAUTION: Ensure that you configure attribute mappings before you start configuring enrichment preferences.

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance** work area.
2. Click the Tasks menu and click Search. Search for Manage Oracle Data as a Service Attribute Mapping and Preferences and open it.

   This page includes two tabs, one for accounts and another one for contacts. You can use these to enable enrichment for accounts and contacts, and configure the data that should be included in the enriched account.
3. Select **Account** or **Contact** to enable enrichment for accounts or contacts, respectively.
4. Enter a match threshold for accounts and contacts in the **Match Threshold** field.
5. Enter the maximum number of records that should be enriched in the **Maximum Number of Accounts for Real-Time Enrichment** and **Maximum Number of Contacts for Real-Time Enrichment** fields.
6. In case of contact enrichment, enter the maximum number of new contacts to create during enrichment in the **Maximum Number of New Contacts** field.
7. Map the source attributes with the required sales attribute. You can also select preferences for each attribute. For example, you can set an attribute to be displayed during real-time enrichment. Note that the preferences aren't available for child fields.

   Note: Click Reset to revert back to the default mapping and preferences.
8. Click **Save and Close**

If you have a preproduction or staging environment, then test the service association between your sales preproduction environment and your Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) subscription. You must limit testing to 500 records. When you go to production, do the service association between your production environments and your Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) production environment. The service association steps are the same, but the test and production service URLs are different. The service URLs are listed in your welcome email and in the Unified Console application.

17 Computer Telephony Integration (CTI)

Overview of Computer Telephony Integration (CTI) in Sales for Redwood

Computer telephony integration (CTI) enables integration of third party media toolbars. You can display a media toolbar by enabling the Partner CTI Service, and by giving your signed-in users the Access Partner Media Toolbar privilege which allows access to the toolbar.

> **Note:** If your users have the standard Sales job roles, you don't need to add the Access Partner Media Toolbar privilege.

Use CTI to:

- Receive phone calls on the Sales for Redwood app and automatically view the caller's contact record or lead record.
- Make an outbound call using Click to Dial and skip manual dialing.

Integrating with CTI gives you the following features:

- Notifications of incoming calls and ability to accept or reject the call
- Automatic caller identification
- Ability to search for a contact
- Optional caller verification
- Display of predefined screen pop with caller or service details
- Automatic interaction recording
- Call wrap up

Prerequisite Setup

First ensure that the Service offering is enabled, and then that the Redwood user interface is enabled. You enable the Redwood user interface through the Service application whether you're using Sales or Service Center.

1. Sign in to Sales or Service as an administrator or setup user.
2. Navigate to **My Enterprise > Offerings**.
3. Click the **Opt In Features** button.
4. From the Opt In: Service screen, locate the **Redwood User Interface for Service** option and make sure that it's enabled.
5. Verify all the child items are also enabled.
6. Click **Done** on the Opt In page, then click **Done** again.

How do I configure profile options to enable the Partner Media toolbar

The profile option SVC_PARTNER_MEDIA_TOOLBAR_ENABLED controls the visibility of the partner media toolbar. If you don't enable the profile option, the partner media toolbar is hidden. You can set this profile option either at a site level or at a user level.

To configure the profile options for enabling the partner media toolbar:

1. Navigate to the Setup and Maintenance work area and open the Tasks panel tab.
2. Click **Search** from the list of displayed tasks.
3. In the **Search** field, type `Manage Admin`.
4. From the displayed list of tasks, click **Manage Administrator Profile Values**.
5. In the Manage Administrator Profile Values page, navigate to the Search: Profile Option region.
6. In the Profile Option Code field, type `SVC_PARTNER_MEDIA_TOOLBAR_ENABLED`.
7. Click **Search**.

   The Search Results: Profile Options region displays the list of profile options.
8. In the Profile Values region, specify the values in the **Profile Value** column for the **Site** Profile Level to 'Yes' if you want the partner media toolbar to be visible to all users.
9. Alternatively, set the Site level value to 'No' and add a new row for a user for whom the partner media toolbar must be visible.
10. Click **Save and Close**.

Note: Ensure that the user is assigned the privilege `Access Partner Media Toolbar` (`SVC_ACCESS_PARTNER_MEDIA_TOOLBAR_PRIV`) before trying to access the toolbar.

How do I configure Multichannel Architecture (MCA) profile options?

Profile options let you configure and control application data centrally. Use the Multichannel Architecture (MCA) profile options to manage the MCA runtime profile option values. Administrators and setup users manage MCA profile options in the Setup and Maintenance work area.

To configure the MCA Profile Options:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Communication Channels
   - Task: Manage MCA Profile Options
2. Click the name of the profile option you want to set.

This displays the **Manage MCA Profile Options** page for the selected profile option code.

3. In the Profile Values section for the profile option code, set the **Profile Value** for the Site **Profile Level**.
4. In the selected profile value, click the **New** icon to add a profile value.
5. Click **Save** or **Save and Close** to save the configuration.

MCA Profile Options

The following table lists the various MCA profile options that you can configure:

Profile Option	Description
SVC_MCA_DISABLE_JWT	Enables or disables the JSON Web Token generation.
SVC_MCA_DISABLE_OUTBOUND_CONTACT_VERIFY	Enables or Disables automatic display of contact verification screen for outbound calls. If enabled, it will override the call flow parameter configurations.
SVC_MCA_DISABLE_OUTBOUND_WRAP_UP	Enables or disables automatic display of the wrap-up screen for outbound calls. If enabled, it will override the call flow parameter configurations for wrap up. **Note:** For Sales for Redwood implementations, this setting must be enabled.
SVC_MCA_ENABLE_ENGAGEMENT_SYNC	Controls the in-focus chat interactions to be automatically associated with their screen popped tabs.
SVC_MCA_RECORD_ACTIVITIES_YN	Indicates whether activities must be logged for real time interactions. **Note:** For Sales for Redwood implementations, this setting must always be disabled (set to No).
SVC_MCA_RT_CHECK_EVENT_DISPATCH_INTERNAL_MS	Sets the number of milliseconds the user must wait for the start communication event. We recommend that you don't change this value unless instructed by Oracle Support.
SVC_MCA_RT_EVENT_DISPATCH_MAX_RETRIES	Sets the number of times the user must wait for reverse lookup to return before running the start communication event. We recommend that you don't change this value unless instructed by Oracle Support.
SVC_MCA_SHOW_CONTACT_ON_WRAP_UP	Indicates whether to show the contact information during the wrap up process.
SVC_OVERRIDE_PARTNER_TOOLBAR_SELECTION	This option allows user to override system default setting of the partner media toolbar. User can select other toolbars from the list of active toolbars.
SVC_OVERRIDE_PARTNER_TOOLBAR_SELECTION	Enables the administrator to override the default setting of the partner media toolbar. The administrator can select other toolbars from the list of active toolbars.
SVC_PARTNER_MEDIA_TOOLBAR_ENABLED	Controls the visibility of the partner media toolbar. If it's not enabled, the partner media toolbar is hidden.
SVC_TOOLBAR_DEBUG_MODE_ENABLED	Turns on the JavaScript logging messages for debugging toolbar-related issues.

CTI Media Toolbar APIs

Media toolbar APIs are a set of JavaScript functions delivered by Oracle to enable Computer Telephony Integration (CTI) partners to integrate their media toolbars with your application.

For information on the media toolbar APIs including details on each available API, see the Related Topics for the CTI Media Toolbar APIs topic in the Implementing Fusion Service guide.

Related Topics

- Overview of the Media Toolbar API

Create a CTI Toolbar for Redwood

Use this task to add a new Redwood toolbar.

1. Sign in as an administrator or setup user.
2. In the Setup and Maintenance work area, choose the following:
    - Offering: Service.
    - Functional Area: Communication Channels.
    - Task: Manage Media Toolbar Configuration.
3. In the Manage Media Toolbar Configuration screen, click the **Add (+)** icon.
4. In the Toolbar work area, do the following:
    - Name: Redwood Toolbar.
    - Layout: Redwood
    - Communication Panel URL: Paste the appropriate URL.
5. In the **Manage Media Toolbar Configuration** list, make sure the **Default** column entry is checked.
6. Click **Save and Close**.

Assign the CTI Toolbar

You can enable the toolbar at site level, meaning it's available to all your users, or you can assign the toolbar to just specific users.

1. In the Setup and Maintenance work area, click the **Tasks** icon, and then click the **Search** link.
2. Enter **Manage Administrator Profile Values** in the Search box and click **Search**.
3. Click the task link, and then in the Manage Administrator Profile Values work area, enter the following search string in the Profile Display name field: **%Partner%**.
4. In the Search results field you have two choices depending on how you want to assign the toolbar.
5. To enable the toolbar at the site level, do the following:
    a. Locate and select SVC_PARTNER_MEDIA_TOOLBAR_ENABLED profile option.

b. If there's a Site Profile Level entry, make sure the Profile Value is set to **Yes**. To disable the toolbar at the site level, set that value to **No**.
c. If there's no Site entry, click the **Add (+)** icon, and from the Profile Level drop down list, select **Site**, and then from the Profile Value drop down list, select **Yes**.

6. To enable the toolbar only for specific users, do the following:
   a. First, make sure the Site Profile Level value is set to **No**.
   b. Then, click the **Add (+)** icon, and from Profile Level drop down list, and select **User**.
   c. And finally, in the User Name field, enter the user's name.
7. When finished, click **Save and Close**.

Call Flow Parameter Settings

The call flow parameters determine the default and administrator-defined actions to be performed for a customer interaction. Customer interactions are calls with the customer in Sales for Redwood and calls or chats in Service Center. Administrator-defined settings override the default settings.

You can specify the settings listed in the following table:

Setting	Options	Description
Contact Required	**Yes/No**	Specifies whether the contact details of a customer must be displayed. **Note:** For Sales for Redwood implementations, you must select **No**. Select **No** if you're using Sales for Redwood.
Contact Verification	**Yes/No**	Specifies whether the customer details must be verified at the beginning of the call. **Note:** For Sales for Redwood implementations, you must select **No**.
Screen Pop	**Yes/No**	Specifies whether a screen pop page must be displayed. Select **Yes**.
Wrap Up	**Yes/No/Server Driven**	Specifies whether a customer interaction requires wrap up. Select the **Server Driven** option to get notified by the toolbar if an interaction must be wrapped up. **Note:** For Sales for Redwood implementations, this setting must always be enabled.

Deactivate Contact Verification

Contact verification allows a user to verify a caller against records already set up in the database prior to the exchange of sensitive information. In Sales for Redwood however, most inbound calls are related to sales opportunities where, for instance, a new lead may be calling about an inquiry. Given that the majority of calls are of this type, call verification isn't required.

1. Sign in to the application as an administrator or setup user.
2. In the Setup and Maintenance work area, go to the following:
    - Offering: Service
    - Functional Area: Communication Channels
    - Task: Configure Call Flow Parameters
3. In the **Default Settings** work area, click the following drop-down lists, and change the value of both to **No**.
    - Contact Required
    - Contact Verification
4. Click **Save and Close**.

Configure Seeded Interaction Outcome Values

By default, Interaction outcome values, such as Call answered, Positive outcome, include values that pertain both to Service users and to Sales users. To configure the list to show only outcomes valid to a Sales user, perform the following task.

1. Sign in to CX Sales as an administrator or setup user.
2. In the Setup and Maintenance work area, and choose **Sales** from the **Setup** drop-down list.
3. Click the **Tasks** icon, then select **Search**.
4. In the Search field, enter **Manage Standard Lookups**, and click the task link in the results.
5. In the Manage Standard Lookups work area, enter ORA_SVC_MCA_RESOLUTION_CD in the Lookup Type field, then click **Search**.
6. Uncheck all values you don't want your users to see.
7. When you're finished, click **Save and Close**.

18 Oracle Digital Assistant

Language Processing Using Oracle Digital Assistant

Sales features that require natural language processing, including sales recommendations, Ask Oracle bar filtering, and the Sales Assistant chatbot, rely on the Oracle Digital Assistant (ODA) platform. Here's a brief overview of concepts that will help you complete the required basic ODA setup and integrate the different sales features. Refer to the ODA documentation to understand the full capabilities of the platform. At present, natural language processing is available for English only.

Here's an architecture overview:

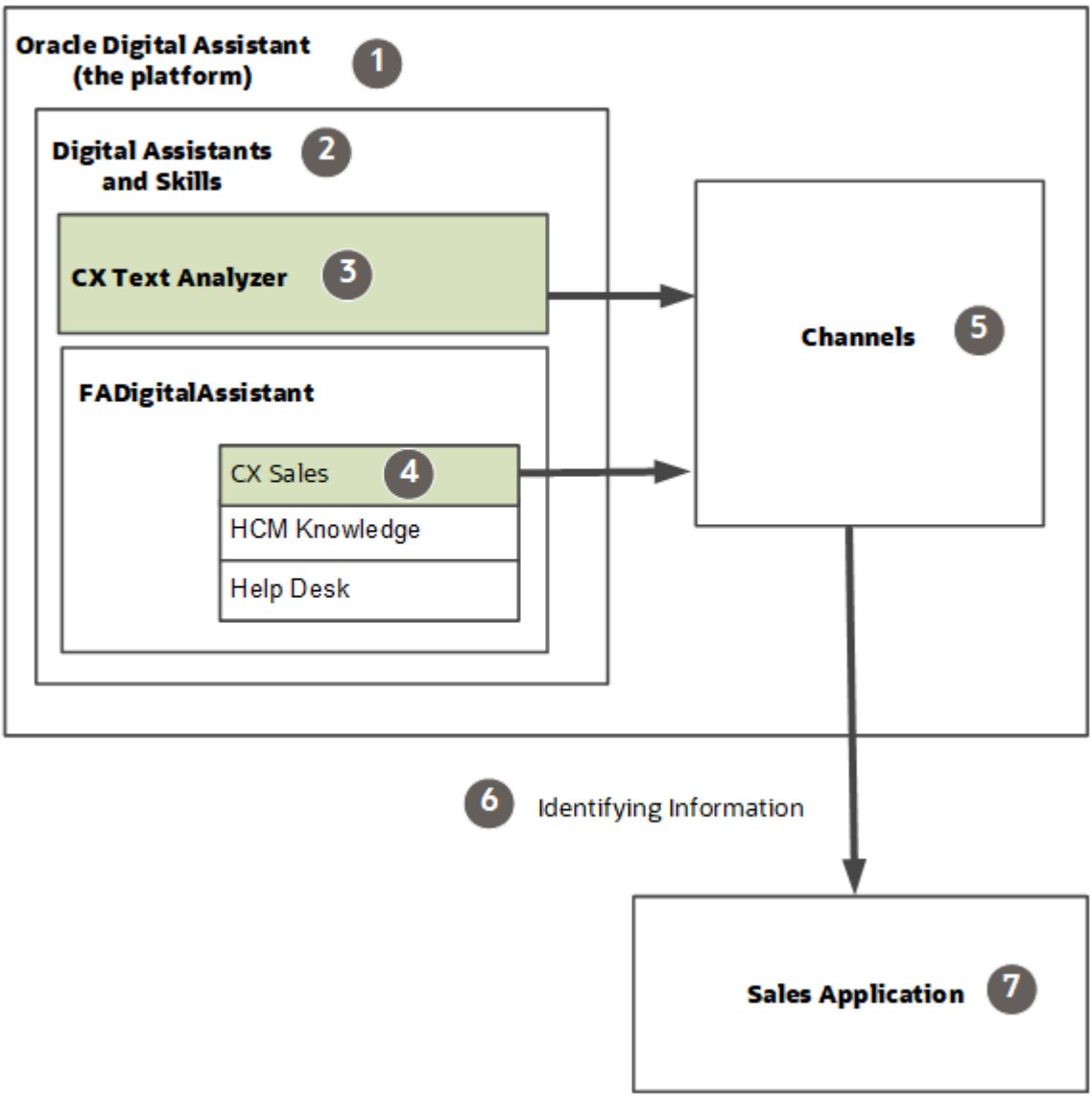
1. Oracle Digital Assistant (ODA) is a platform that's used to create chatbots and to provide natural language processing for other applications and features.
2. Different domains, such as sales, service, and financials, require different sets of language skills. Oracle provides some skills as stand-alone components. It builds others into digital assistants. You can install both in your ODA application instance from the ODA "store".
3. For all Oracle cloud application chatbots, including the Sales Assistant, and for filtering activities, you install (the term used is "pull") the FADigitalAssistant digital assistant.
4. FADigitalAssistant includes multiple chatbot skills, including CX Sales, Help Desk and HCM Knowledge. For sales, you're using only the CX Sales skill.
5. For the Recommendations feature in both the Sales for Redwood UI and in CX Sales Mobile,, you install ("pull") the CX Text Analyzer skill.
6. For each sales feature that uses natural language processing, you create a separate channel. There are different types of channels for different uses.
    - For sales recommendations (handled by the CX Text Analyzer skill) in both the Sales for Redwood UI and in CX Sales Mobile, you create the Webhook channel. The Sales Recommendations feature analyzes the text of call logs and notes salespeople enter to recommend what action to take.
    - For the CX Sales skill in FADigital Assistant, different channels handle different applications:
        - To enable natural language filtering of activities, you create an Oracle Web channel.
        - To enable the Sales Assistant chatbot in CX Sales Mobile, you create Oracle Web channel. You can use the same Oracle Web channel for both activities filtering and Sales Assistant.
        - To enable the Sales Assistant chatbot for Microsoft Teams in CX Sales Mobile, you create a Microsoft Teams channel.
7. After you create and activate a channel, you copy over identifying information from the channel to the sales application to complete the link. You can learn how to create the channel for each feature and how to create the link by reviewing the documentation for the feature.

Here's a visual overview of the integration between Sales and the Oracle Digital Assistant platform:

Oracle Digital Assistant Integration Elements

Callout	Description
1	Oracle Digital Assistant (ODA) is a platform that's used to create chatbots and to provide natural language processing for other applications and features. It bundles others into digital assistants You can install both in your ODA application instance from the ODA "store".

Callout	Description
2	Different domains, such as sales, service, and financials, require different sets of language skills. Oracle provides some skills as stand-alone components. Others are bundled into digital assistants.
3	For Sales, you use the CX Text Analyzer skill set for the Sales Recommendation feature.
4	For activities filtering and for the Sales Assistant chatbot in CX Sales Mobile and Microsoft Teams, you use the FADigitalAssistant.
5	You connect the skills in ODA to the sales application, by creating different types of channels.
6	You copy the identifying information in a channel.
7	And enter it in the Sales Application. How you enter the information varies depending on the channel.



Related Topics

- Getting Started with Oracle Digital Assistant for Cloud Applications.

Overview of Common ODA Setup for Sales

Here's an overview of the basic Oracle Digital Assistant setup that you must complete for sales features that use natural language processing, including sales recommendations and the Sales Assistant chatbot used with Oracle CX Sales Mobile and Microsoft Teams.

Step	Setup Task	Application	Description	Where to Get More Details
1	Enable a user to administer the Oracle Digital Assistant application.	Oracle Identity Cloud Service (IDCS)	In IDCS, you must provide the user setting up the sales feature with the ability to administer the Oracle Digital Assistant (ODA) platform. This one-time setup involves importing sales users into IDCS, and assigning the Service Administrator role to the user doing the setup in ODA. You must have the Identity Domain Administrator role to complete this step.	See the topic: *Enable Users to Administer Oracle Digital Assistant*. For additional information, see the Oracle Digital Assistant documentation: *Getting Started with Oracle Digital Assistant for Cloud Applications.*
2	Copy the URL for the Oracle Digital Assistant (ODA) for your use in setup.	Oracle Identity Cloud Service (IDCS)	You can obtain the URL to access the ODA platform UI during your IDCS setup. Just copy the URL from the idcs-oda application Configuration tab, Resources section, Primary Audience field. This step is optional. After you opt in to the Digital Assistant feature in your sales application (step 3), you can also access the ODA platform UI directly from the sales application through the Manage Digital Assistant setup task.	See the topic: *Obtain the Oracle Digital Assistant URL*
3	Opt in to the Digital Assistant feature.	Sales application	Opt in to the Digital Assistant feature. This is a one-time setup.	See the topic: *Opt in to Oracle Digital Assistant*

Step	Setup Task	Application	Description	Where to Get More Details
			After you do so, you can access the ODA platform UI directly from Setup and Maintenance in the Sales application using the Manage Digital Assistant setup task.	
4	Install the Digital Assistant for Fusion Applications (FADigitalAssistant) provided by Oracle.	Oracle Digital Assistant	In the ODA platform, you must pull (install) the FADigitalAssistant and the CX Text Analyzer from the application's skill store. The FADigitalAssistant includes the CX Sales skill that's required for activities filtering and the Sales Assistant chatbot in the CX Sales Mobile and Microsoft Teams applications. The CX Text Analyzer digital assistant is required for the Sales Recommendations feature.	See the topic: *Install the Digital Assistants*
5	Create channels for the features that use natural language processing and hook them up to Sales.	Use Oracle Digital Assistant for the channel creation.	How you create the channels and how you hook them up depends on the feature. Follow the setup instructions in the chapters covering different features.	See the topics: • *Overview of Sales Recommendations Setup* • *Overview of Natural-Language Filtering Setup for Activities* • *Set Up Oracle Sales Assistant for CX Sales Mobile* • *Set Up Oracle Sales Assistant for Microsoft Teams*
6	Periodically update the FADigitalAssistant and CX Text Analyzer digital assistants.	Oracle Digital Assistant	FADigitalAssistant and the CX Text Analyzer digital assistants are updated every release and three times within each release. You should periodically update both to the latest version.	See the topic: *Refresh the Digital Assistants*

Enable Users to Administer Oracle Digital Assistant

Before you can set up the integration with the Oracle Digital Assistant (ODA) platform, you must grant one or more users the appropriate permission in the Oracle Identity Cloud Service.

Here's how:

- Import the users from your sales application into the Oracle Identity Cloud Service (IDCS).

  Although you only need one user to perform the integration and administer the service, you must import all of them.
- Assign the Service Administrator Role to the user who will be doing the ODA integration.

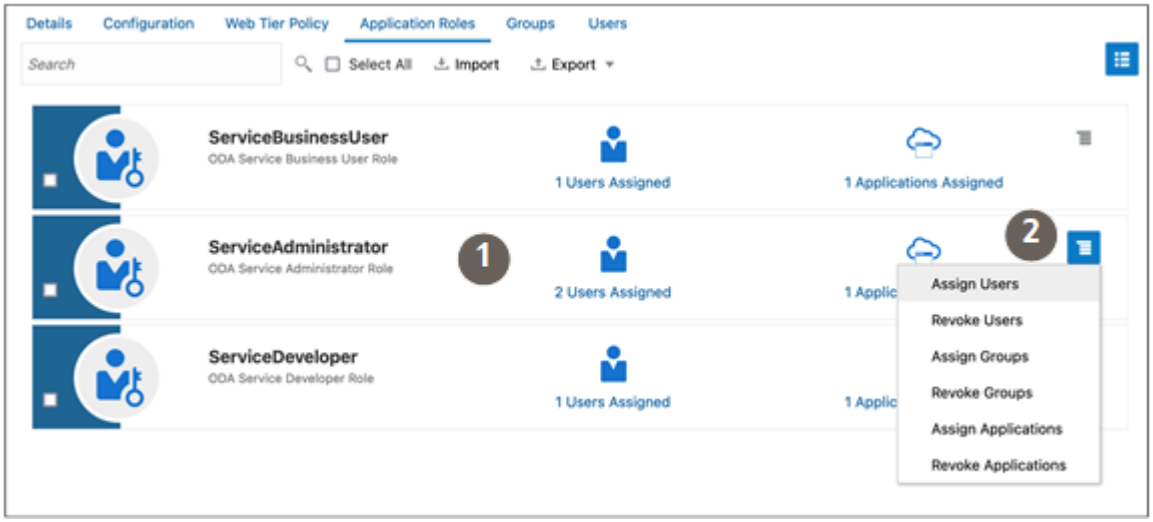
Import Sales Users into IDCS

1. Sign in to Oracle Identity Cloud Service.
2. To import the users, enable user synchronization:
   a. Click **Navigator** > **Oracle Cloud Services**
   b. Search for and select the Oracle Applications Cloud instance.
   c. Click the **Provisioning** tab.
   d. Turn on **Enable Provisioning.**
   e. In the **Select Provisioning Operations** section of the page, select the **Authoritative Sync** check box.
   f. Turn on **Enable Synchronization**.
   g. Click **Save**.
3. Verify that the users are available and synchronized in the application:
   a. Click the **Users** tab.
   b. Check whether the users are available in the application. If they're not, import the users:
      i. Click the **Import** tab.
      ii. Click **Import**.

Assign the Service Administrator Role to the User Performing the Integration

1. While signed in to the Oracle Identity Cloud Service, click **Navigator** > **Oracle Cloud Services**.
2. Search for the application name that starts with idcs-oda.
3. Open the application.
4. Click the **Applications Roles** tab.

5. Select the **Service Administrator** role (callout 1 in the screenshot) and click the corresponding menu item (callout 2).

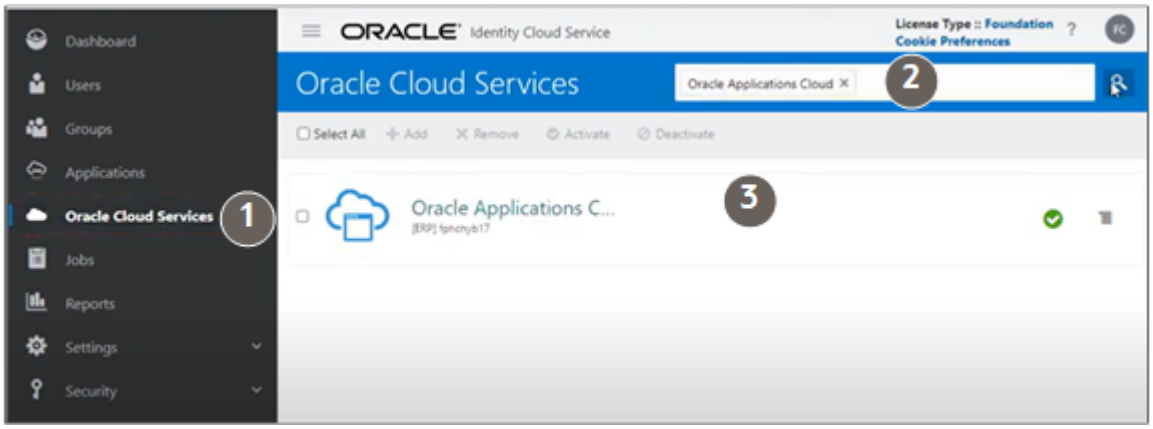


6. From the menu, select **Assign Users**.
7. Search for the user you want to assign.
8. Select the user and click **OK**.

Obtain the Oracle Digital Assistant URL

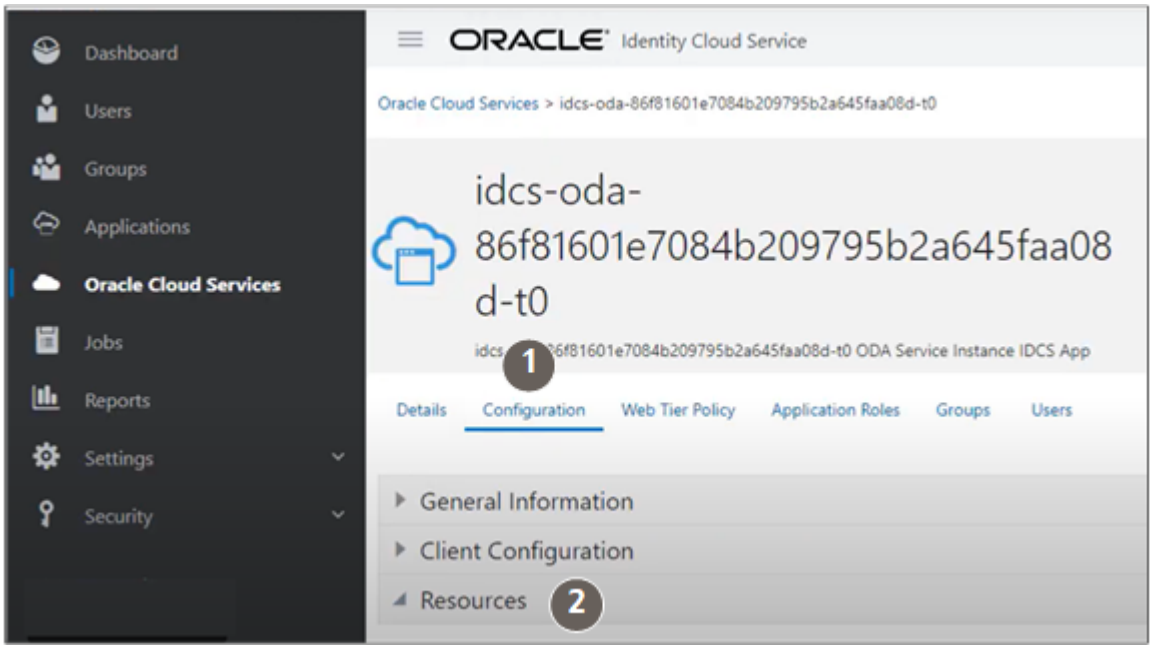
Here's how to obtain the URL that you can use to access to the Oracle Digital Assistant platform for setup.

1. While signed in to the Oracle Identity Cloud Service (IDCS), click **Navigator** > **Oracle Cloud Services** (callout 1 in the screenshot).
2. Search for the application name that starts with idcs-oda (callout 2).
3. Click to open the application (callout 3).

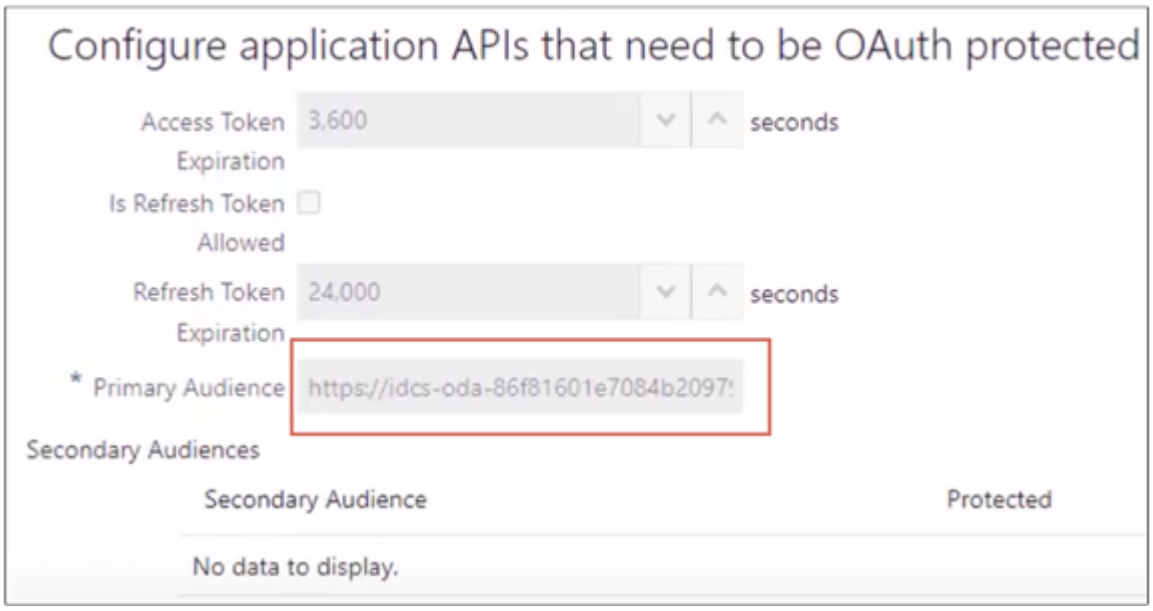


4. Click the **Configuration** tab (callout 1 in the following screenshot).

5. Expand the **Resources** section (callout 2).



6. Copy the URL from the **Primary Audience** field (highlighted in the following screenshot)



Install the Digital Assistants

To enable the integration, you must pull the FADigital Assistant and the CX Text Analyzer digital assistants from the Oracle Digital Assistant platform store. The FADigitalAssistant includes the CX Sales skill that's required for activities filtering and the Sales Assistant chatbot in the CX Sales Mobile and Microsoft Teams applications. The CX Text Analyzer digital assistant is required for the Sales Recommendations feature.

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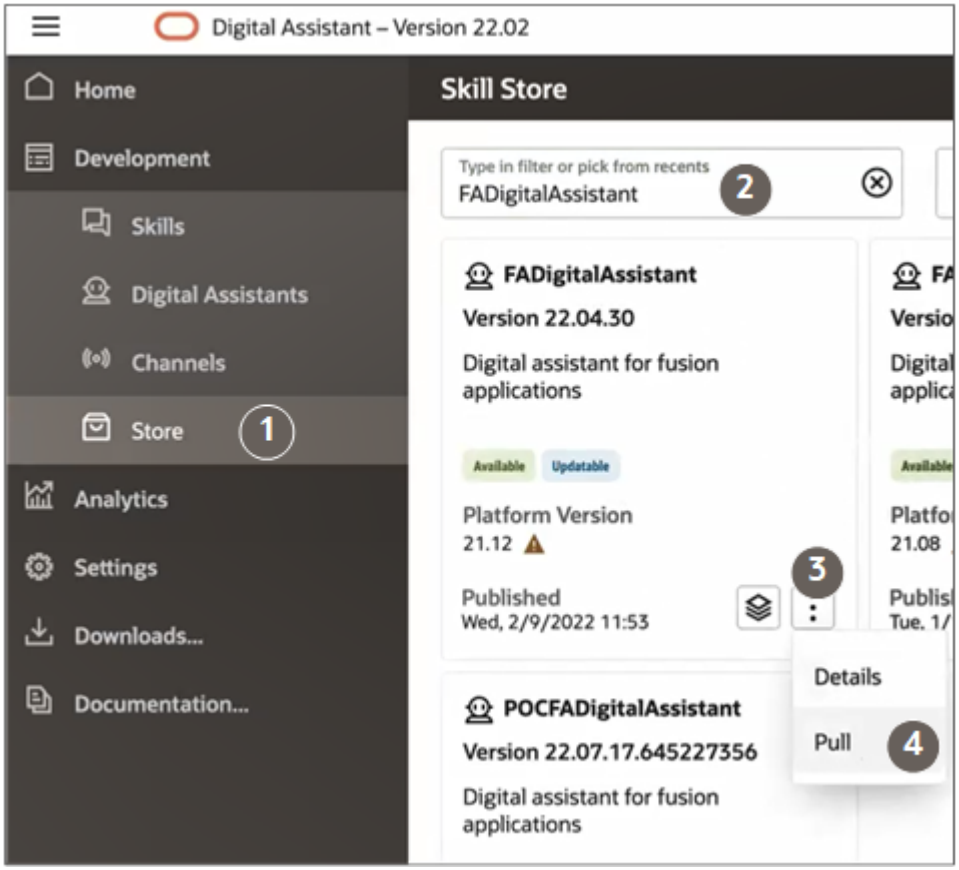
1. Sign in to Oracle Digital Assistant as the user granted the administrative privilege.
2. Click the **Navigator**.
3. Expand the **Development** menu item.
4. Click **Store** (callout 1 in the screenshot).
5. In the Skill Store, search for either FADigitalAssistant or CX Text Analyzer.
6. Locate the version that corresponds to your application release, the first four digits of the version number. For example, Version 22.04.30 corresponds to applications version 22A. The last two digits show the FADigitalAssistant version. To see all available versions, click **Display all versions of this skill** (the square icons) next to the Actions menu.
7. Click **Actions** (three vertical dots highlighted by callout 3) and select **Pull** (callout 4).



Opt in to Oracle Digital Assistant

You must opt in to the Digital Assistant feature. Opting in enables the Digital Assistant functional area in the Sales offering. You can then open Oracle Digital Assistant directly from the sales application using the Manage Digital Assistant setup task.

1. Navigate to the Setup and Maintenance work area and select the **Sales** offering.
2. In the **Functional Areas** pane, click **Change Feature Opt In**.
3. Enable the **Digital Assistant** functional area by selecting the check box.
4. Click **Done**.
5. From now on, you can open the Oracle Digital Assistant from the Sales offering:
    a. In the **Functional Areas** pane, click **Digital Assistant**.

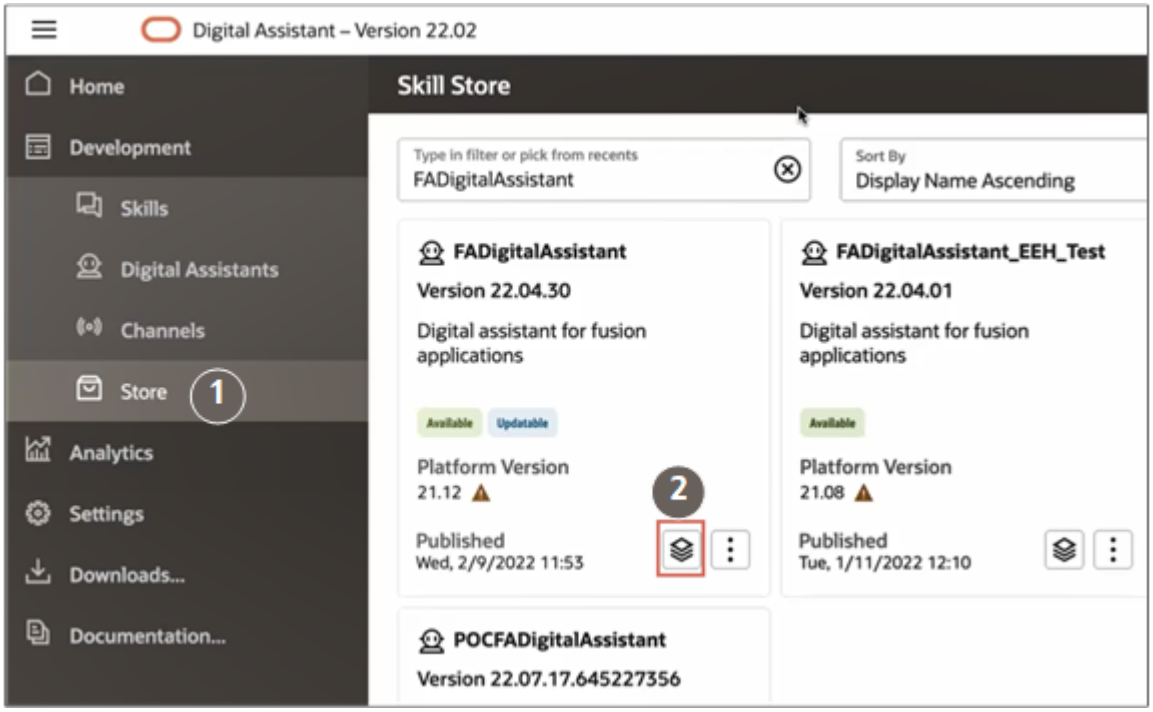
b. In the **Task** pane, click the **Manage Digital Assistant** task.

Refresh the Digital Assistants

Oracle updates both digital assistants used in Sales (FADigitalAssistant and the CX Text Analyzer) once very release and multiple times between releases. To get the full benefit of the feature, you must ensure that you have the latest version that corresponds to your sales application version.

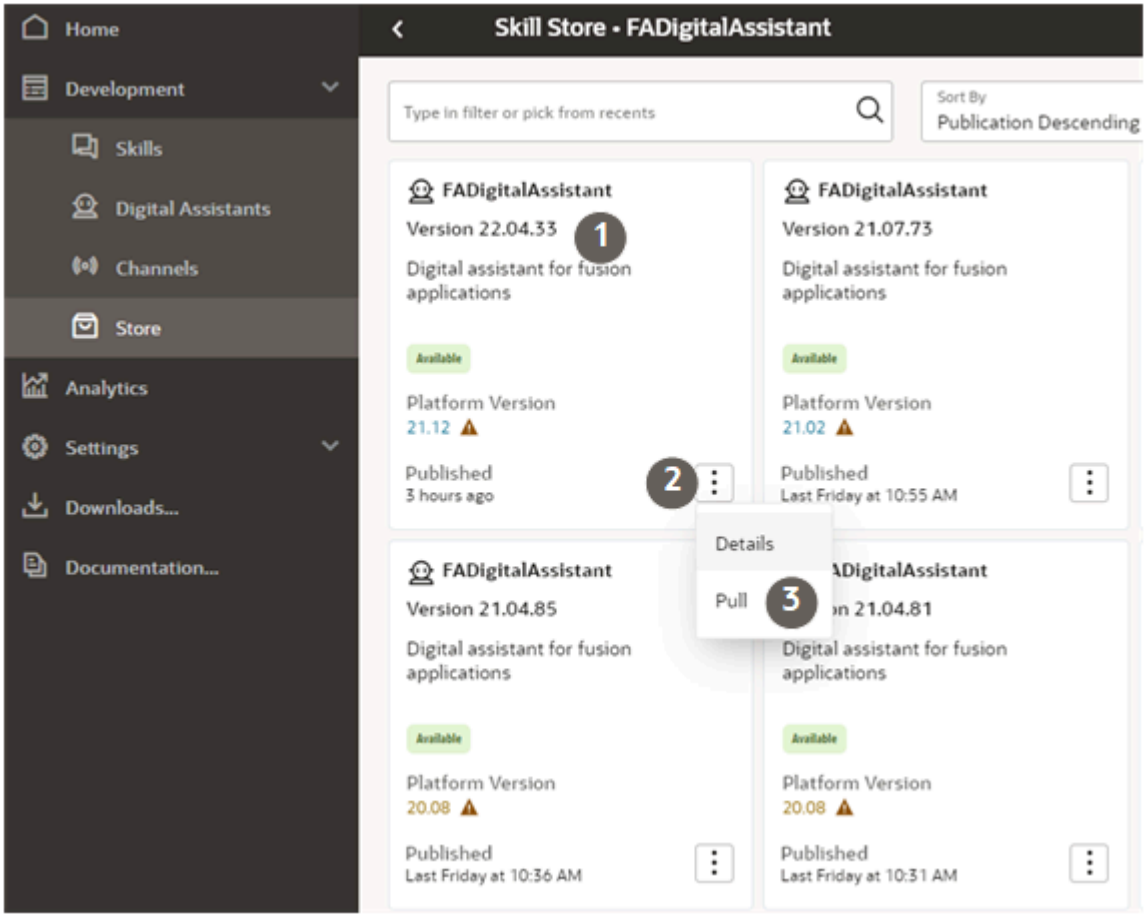
Here's how to get the latest updates:

1. Sign in to Oracle Digital Assistant as the user granted the administrative privilege.
2. Click the **Navigator**.
3. Expand the **Development** menu item.
4. Click **Store** (callout 1 in the screenshot).
5. In the Skill Store, search for **FADigitalAssistant** or **CX Text Analyzer**.
6. Locate the version that corresponds to your application version. The first four digits of the version number correspond to the release. For example, Version 22.04.33 (callout 1 in the following screenshot) corresponds to applications version 22A. The last two digits show the FADigitalAssistant version.
7. Click **Display all versions of this skill** (callout 2 in the screenshot).



8. Find the latest version for your release (the highest number) (callout 1 in the following screenshot).

9. Click **Actions** (three vertical dots highlighted by callout 2) and select **Pull** (callout 3).



10. Now select the refreshed skill in the channel:
    a. Click **Channels**.
    b. Select the channel to refresh the skill in the list of channels.

> **Note:**
>
> - For Oracle Sales Assistant for Microsoft Teams, configure the Microsoft Teams channel. See *Set Up Oracle Sales Assistant for Microsoft Teams* in the Implementation Reference guide for more information.
> - For CX Sales Mobile, configure the Oracle Web Channel. See the topic *Enable Sales Assistant for CX Sales Mobile*.

    c. In the **Route to** field, select the new skill version.
    d. In the Change Channel Routing dialog, click **Change**.

19 Sales Recommendations

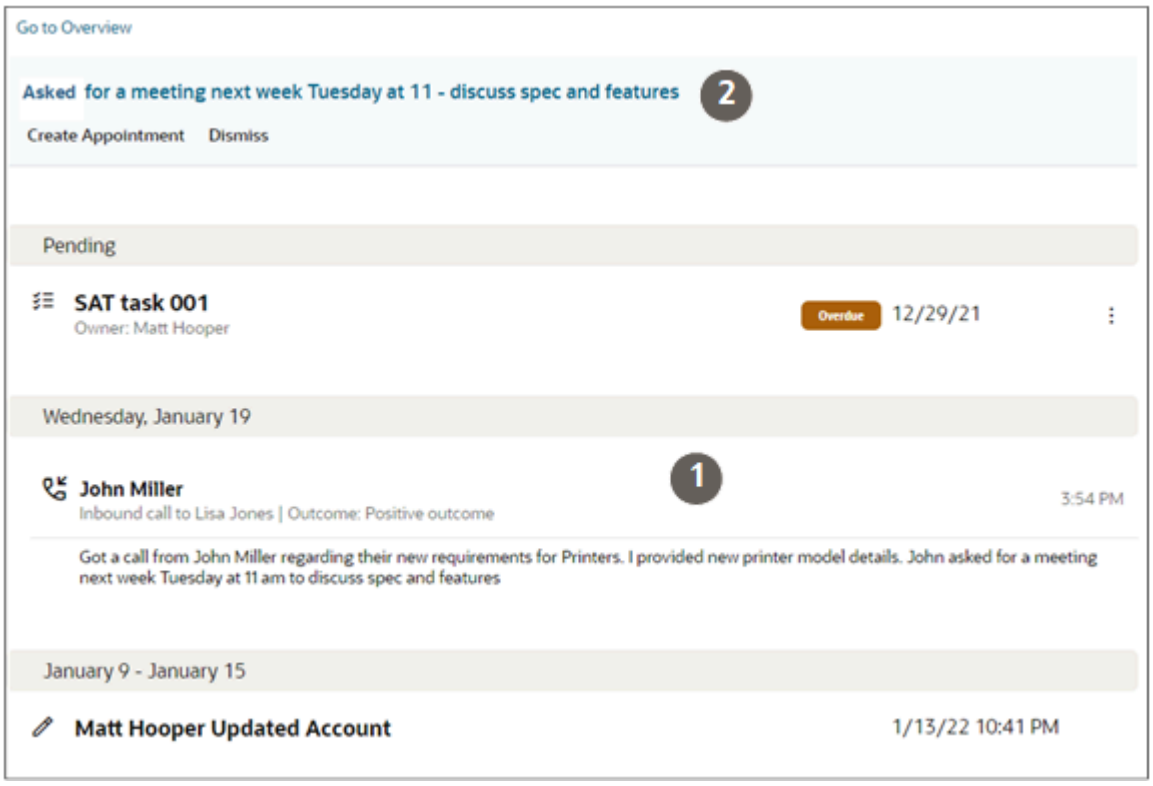
Recommended Actions from Text Analysis

When you enable sales recommendations, the application analyzes the English-language text in notes and call logs and recommends appropriate follow-up actions. An action can be to create a task, an appointment, or a contact, depending on the text that was entered. The recommendations appear at the top of the Activities panel and page where salespeople can either accept or dismiss them. You can enable the same sales recommendations you set up here for CX Sales Mobile with minimal additional setup. At present, the sales recommendations feature and other natural-language processing features are available in English only.

Suppose, for example, that a salesperson enters "asked for a meeting next Tuesday at 11" in a call wrap-up and saves. Based on the text, the application suggests the creation of an appointment.

This screenshot shows the recommended appointment viewed in the Activities page in Sales for Redwood. The CX Sales Mobile app works very much the same way.

- The recommendation (callout 2)
- The text on which it was based (callout 1)



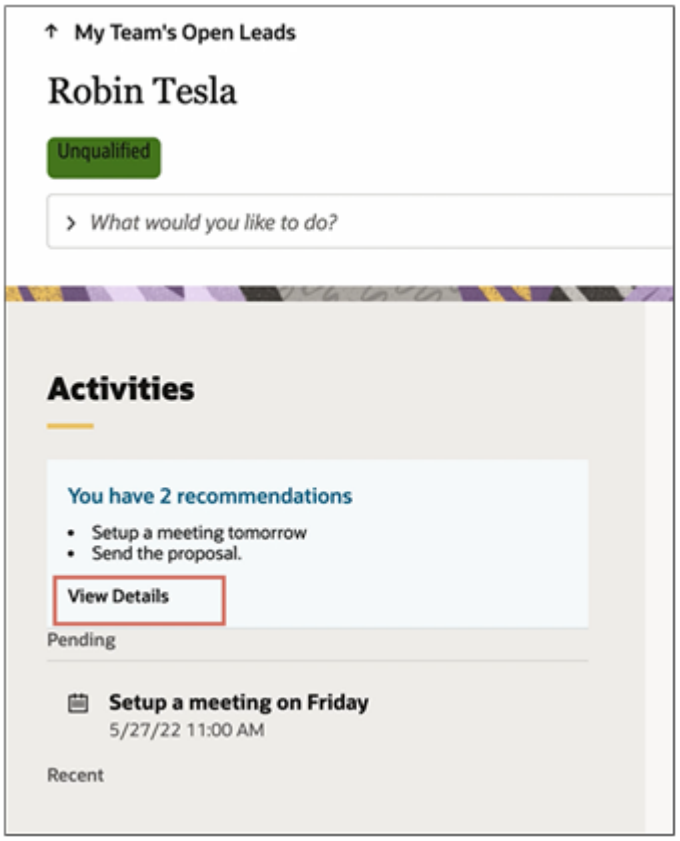
Salespeople can either create the appointment or click **Dismiss** to reject the recommendation and remove it from view. The application schedules the appointment at the time specified in the text and in the salesperson's time zone. The appointment includes the relevant text from the call wrap-up.

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

Multiple Recommendations

If salespeople receive multiple recommendations either, they can review and act on them one by one either on the Activities pane or page by clicking the **View Details** link.

Here's a screenshot of the Activities panel on a lead listing two sample recommendations. The View Details link is highlighted.



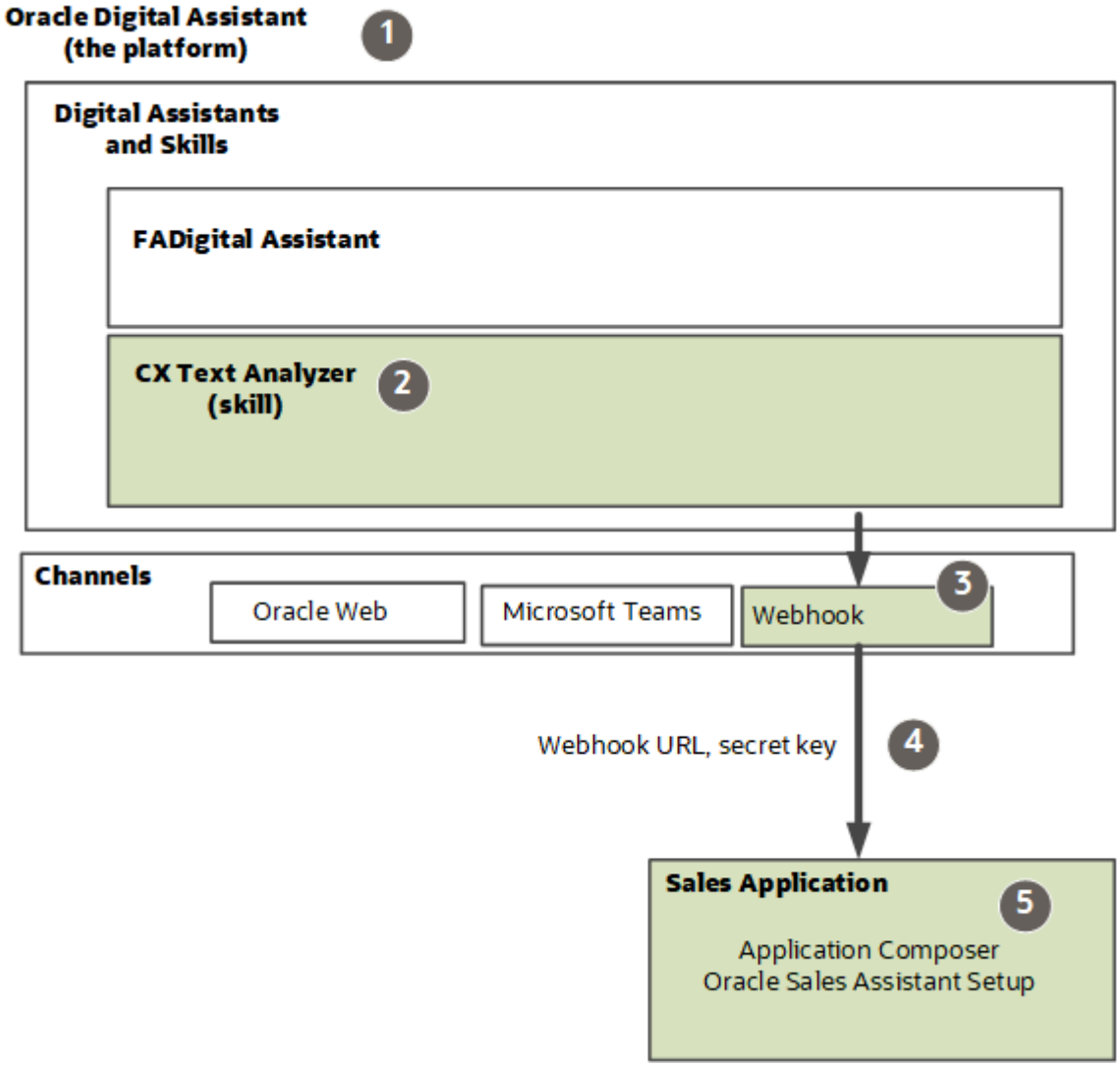
Oracle Digital Assistant and Sales Recommendations

Sales recommendations use the text analysis features of Oracle Digital Assistant (ODA). Here's a brief overview of the different features and concepts that will help you in your integration.

Overview of the Oracle Digital Assistant Integration for Sales Recommendations

Callout	Description
1	Oracle Digital Assistant (ODA) is a platform that's used to create chatbots and to provide language analysis for other applications and features. ODA is used not only by the sales recommendations feature, but also by CX Sales Mobile, and the integration with Microsoft Teams, for example.

Callout	Description
2	Different domains, such as sales, service, and financials, require different sets of language skills. Oracle bundles some of these predefined skills into digital assistants, such as FADigital Assistant. Others are available as stand-alone skills. You install both types in your ODA application instance from the ODA "store". For sales recommendations, you install (the term used is "pull") the CX Text Analyzer skill.
3	Applications integrate with the different skills through channels of different types. To integrate the CX Text Analyzer skill with the sales recommendations feature, you create a channel of type Webhook and associate the CX Text Analyzer skill to it.
4	After you create and activate the channel, you copy its Webhook URL and secret key.
5	To link the channel to the sales application, you enter the Webhook URL and secret key into Application Composer (Oracle Sales Assistant Setup, Configure Text Analysis tab).



Overview of Sales Recommendations Setup

Sales for Redwood uses the natural language processing capabilities of the Oracle Digital Assistant (ODA) to analyze the text of notes and tasks. This guide covers only the steps to enable the Sales Recommendations feature using the Sales skill in ODA provided by Oracle. For information on creating skills and other ODA features, you must follow the instructions in the Getting Started with Oracle Digital Assistant for Cloud Applications.

> **Note:** Sales recommendations from Sales Insights and Opportunity next best action are also available as part of central recommendations.

Here's an overview of the setup tasks.

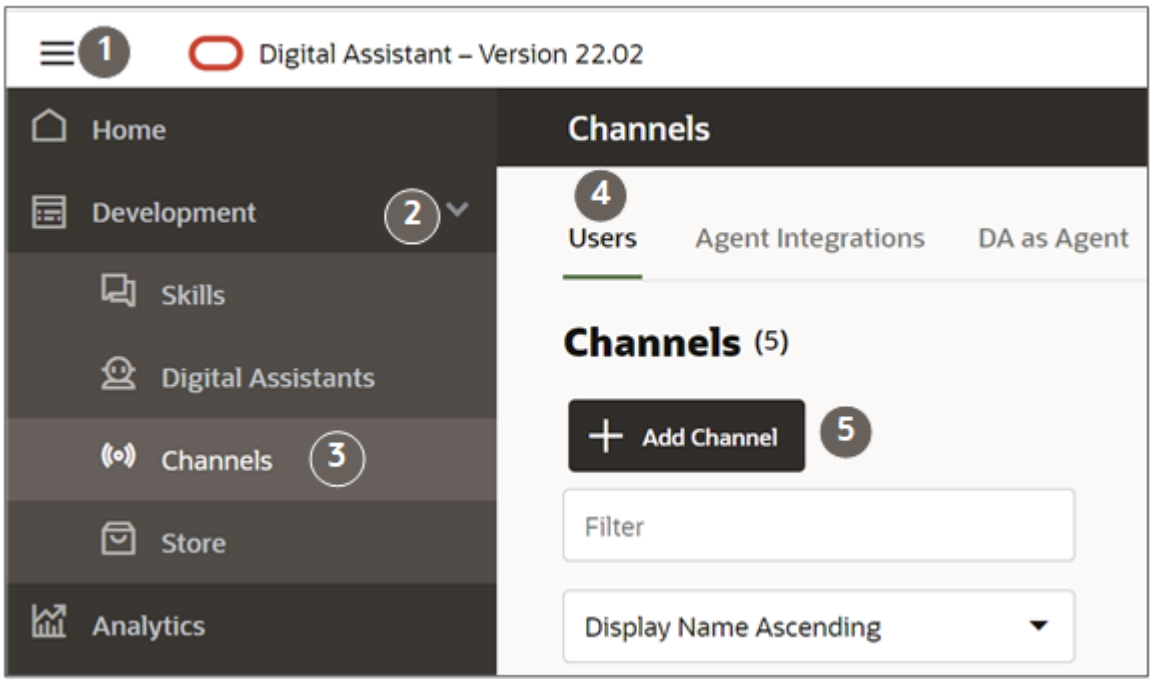
Step	Setup Task	Application	Description	Where to Get More Details
1	Complete the prerequisite Oracle Digital Assistant application setup.	Oracle Identity Cloud Service (IDCS)	Before you set up any of the features that use natural-language processing, you must perform some prerequisite setup of Oracle Digital Assistant: • Set up administrator users • Obtain the ODA URL • Install (pull) the CX Text Analyzer skill • Enable the Digital Assistant used for Oracle Fusion Cloud Applications If you already completed the setup for another feature, you can skip this step.	See the topic: *Overview of Common ODA Setup for Sales*. For additional information, see the Oracle Digital Assistant documentation: *Getting Started with Oracle Digital Assistant for Cloud Applications.*
2	Create the Webhook channel to sales	Oracle Digital Assistant	Create the Webhook channel that enables the analysis of sales text. After you create the channel, you copy the Webhook URL and secret key for use in the next step.	See the topic: *Create a Webhook Channel*
3	Associate the Webhook channel that you created to the sales application.	Sales application	Enter the Webhook URL and secret key in Application Composer (**Application Composer** > **Common Setup** > **Oracle Sales Assistant Setup** > **Configure Text Analysis**).	See the topic: *Associate the Webhook Channel to Sales and Specify Recommendation Options*

Step	Setup Task	Application	Description	Where to Get More Details
			You then enable text analysis, and disable any fields you don't want analyzed.	
4	Enable Recommendations	Sales application	Opt in to the Sales Recommendations feature.	See the topic: *Enable Sales Recommendations*

Create a Webhook Channel

Create a Webhook channel so that the meeting notes can be sent to Oracle Digital Assistant for text analysis.

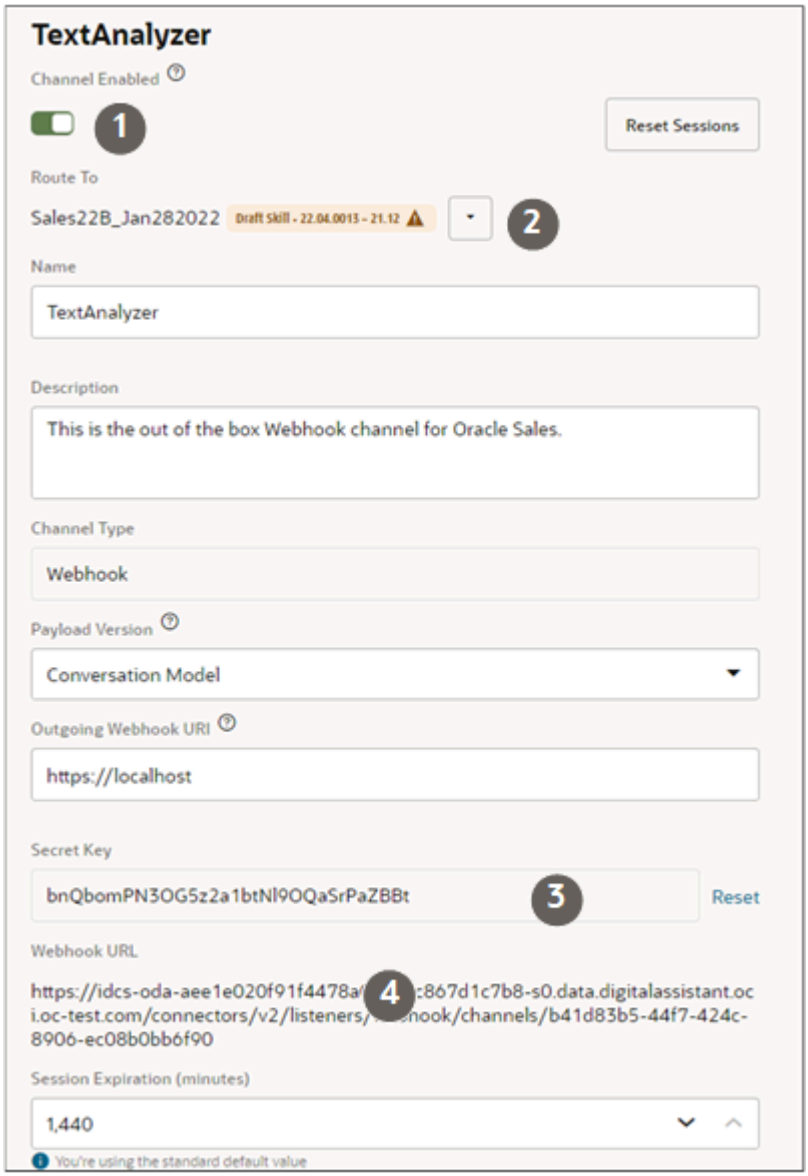
1. Navigate to the Setup and Maintenance work area and select the **Sales** offering.
2. In the **Functional Areas** pane, click **Digital Assistant**.
3. In the **Task** pane, click the **Manage Digital Assistant** task.
4. On the Oracle Digital Assistant home page, click the **Navigator** (the hamburger menu highlighted by callout 1).



5. Expand the Development menu item (callout 2).
6. Click **Channels** (callout 3).
7. Make sure that the **Users** tab is selected (callout 4).
8. Click **Add Channel** to open the Create Channel window.
9. Make these entries in the Create Channel window:
    a. Give your channel a name.
    b. Select **Webhook** as the channel type.
    c. In the **Payload Version** field, select the **Conversation Model** option.

d. Enter an arbitrary value in the **Outgoing Webhook URL** field. It doesn't matter what you enter. Just don't enter a real URL.
e. Don't change the value in the **Session Expiration** field.
f. Click **Create**.

10. In the **Route To** field, select the **TextAnalyzer** skill that you pulled from the store earlier (callout 2 in the screenshot).

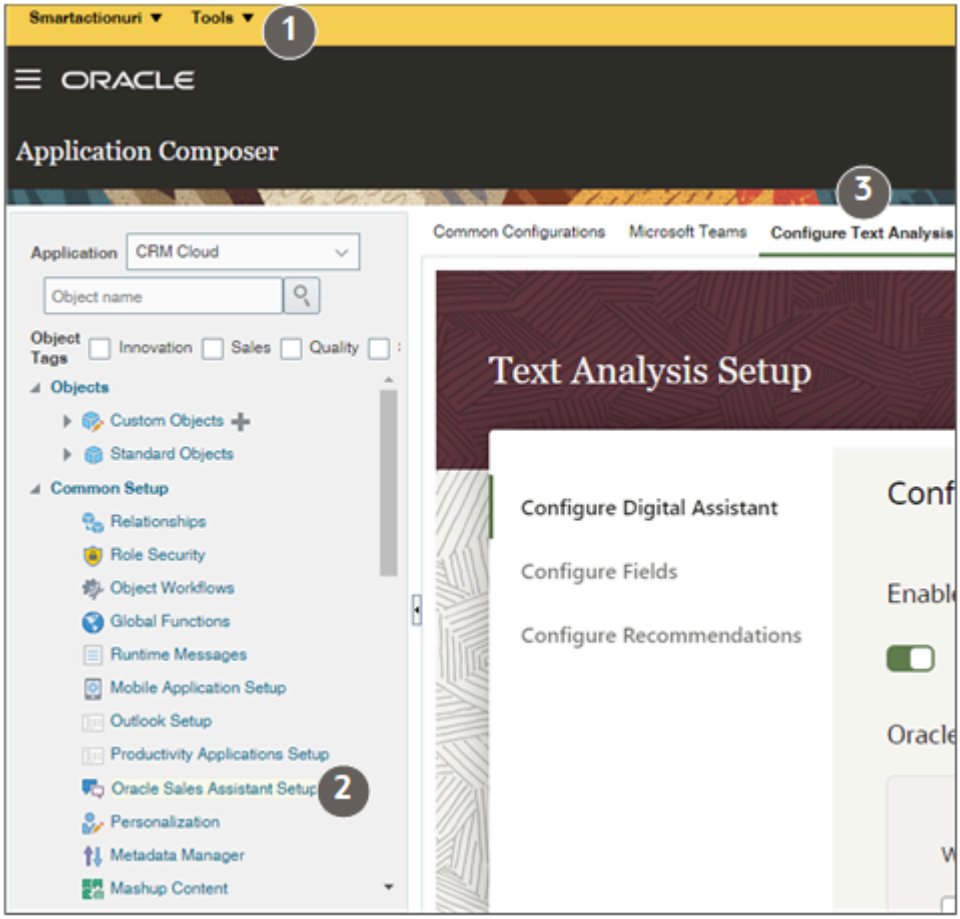


11. Scroll to the **Secret Key** (callout 3) and **Webhook URL** fields (callout 4) and copy both of the values.
12. Now enable the channel by clicking the **Channel Enabled** toggle (callout 1 in the screenshot).

Associate the Webhook Channel to Sales and Specify Recommendation Options

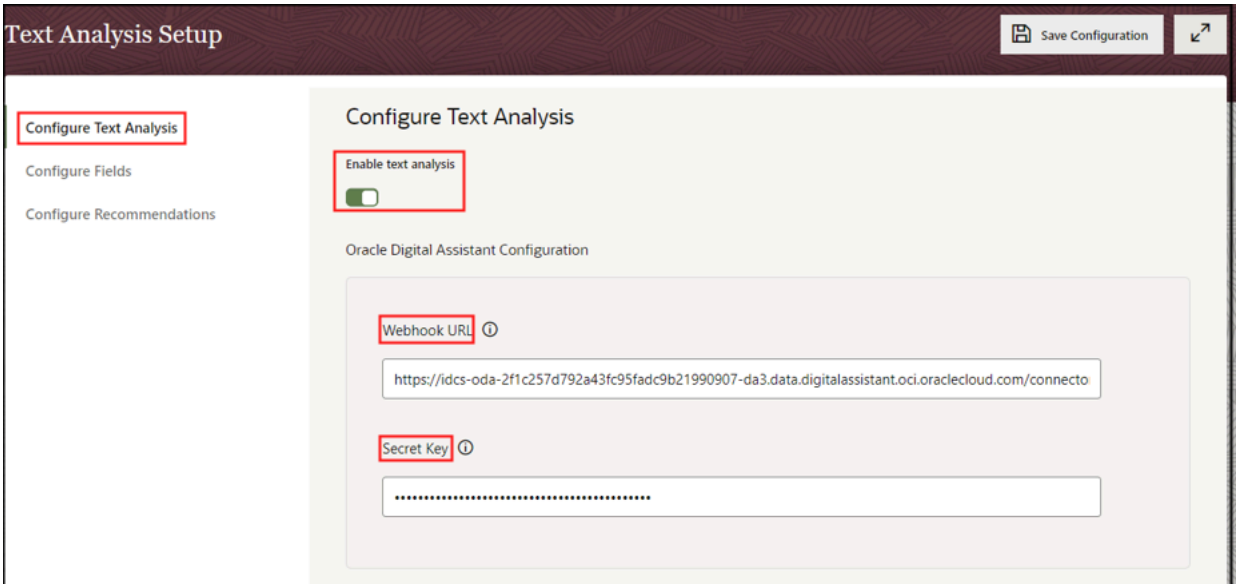
Here's how to associate the Webhook channel you created for recommendations to the sales application and how to specify which recommendations you want displayed to which audience. You can specify which fields you want analyzed and which job roles and regions will see the recommendations. By default, the application analyzes the text entered in all of the available fields to all job roles and regions.

1. Enter an active sandbox with the Application Composer as one of the available tools (callout 1 in the screenshot)
2. Open **Application Composer**.
3. Click **Oracle Sales Assistant Setup** under the Common Setup heading in the left-hand pane (callout 2 in the screenshot).



4. Click the **Configure Text Analysis** tab (callout 3).

5. On the Configure Text Analysis tab, activate the **Enable text analysis** option as highlighted in the sample screenshot.



6. Enter the Webhook URL and the secret key that you obtained when you set up the Webhook channel.
7. Click **Configure Fields**.
8. On the Configure Fields tab, specify which fields get analyzed and generate recommended actions. By default, all the available fields are enabled.
9. Next, click **Configure Recommendations** to select which recommended actions you want displayed and for whom. If your organization doesn't use appointments, you can turn off any recommendations to create appointments, for example. By default, all available recommended actions display for all salespeople.

   You can disable the action completely, or restrict availability by job role and geography. For example, you can specify that you want only sales managers in Germany to receive suggestions to create appointments. To do so, expand Create Appointment and enter Sales Manager in the roles box and Germany in the regions box.

   > **Note:** Any restrictions by job role and geography you specify here also affects the availability of recommendations in CX Sales Mobile. During CX Sales Mobile setup you can restrict availability further but the settings you make here take precedence.

10. Click **Save Configuration**.
11. You must publish the sandbox to make your changes active.

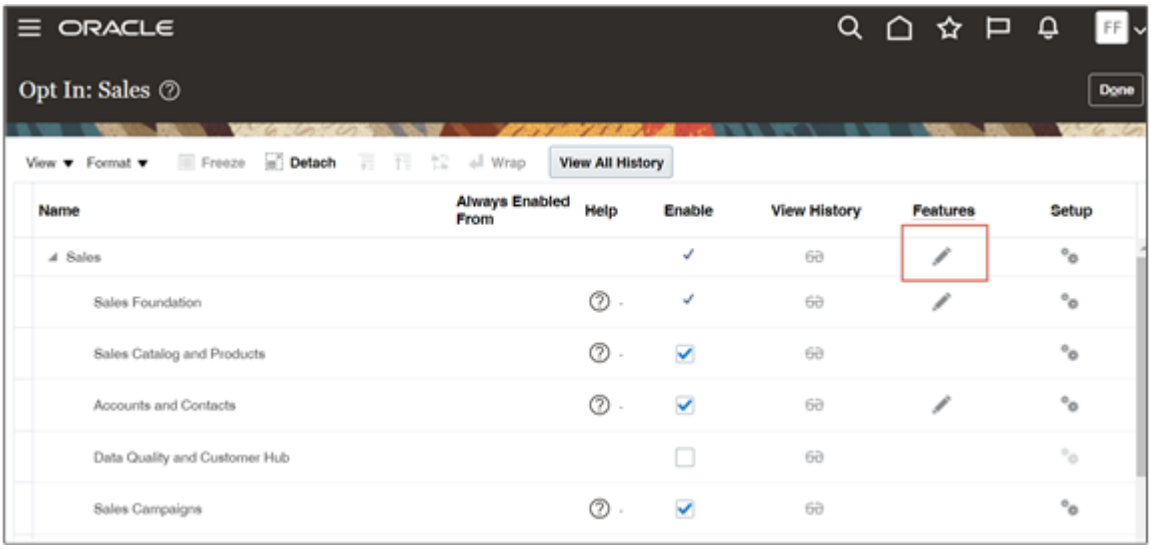
Related Topics

- Create and Activate Sandboxes

Enable Sales Recommendations

Here's how to enable sales recommendations. The sales recommendation feature analyzes text of notes and call logs and recommends follow-up tasks and appointments. When enabled, this feature replaces the automatic creation of a task after call wrap ups.

1. Open the **Setup and Maintenance** work area and select the Sales offering.

2. In Setup: Sales, click the **Change Feature Opt In** link.
3. In the Opt In: Sales page, click **Features** for Sales (the pencil icon in the topmost row highlighted in the screenshot).
4. 

5. Select **Enable** for **Sales Recommendations**.
6. Click **Done**.

Turn Off Unwanted Recommendations

You can turn off sales recommendations for features that you don't use in your implementation in Application Composer Sales Assistant Setup. For example, if you don't use appointments, you can disable recommendations to create appointments.

For navigation details, see the topic: *Associate the Webhook Channel to Sales and Specify Recommendation Options*

20 Quoting

Overview of the Oracle Sales and Oracle CPQ Integration

The integration between Oracle Sales and Oracle CPQ supports standard B2B selling processes, which feature highly configurable products, variable or dynamic pricing models, discount negotiations requiring executive approval, and large, branded sales documents.

Oracle CPQ ensures that sales forecasts are reliable and based on real-world quotes. It ensures that sales orders are valid and contain the correct billing and shipping details to eliminate costly change orders. Additionally, quote data feeds back into Sales, so that businesses can analyze and improve the overall efficiency of their sales teams.

The integration steps help you configure a solution that combines the power of these applications, while reducing the cost of ownership and the time needed to deploy the application. However, the integration remains configurable and extensible, so it can support a wide range of use cases serving any industry. For more information, see *Overview of Planning Your Implementation*.

21 Web Conference Integration

Overview of Web Conference Integration Setup

You can setup and enable web conferences using either Microsoft Teams or Zoom.

- To implement the integration with Microsoft Teams, follow the instructions in the *How do I integrate Microsoft Teams with Redwood User Experience?* playbook.
- To set up Zoom, follow the instructions in the topic *Configure Zoom Web Conference for Your Sales Application*

In both cases, you must enable web conferencing for appointments so that web conferencing can be used in orchestrations. For steps, see the topic *Enable Web Conferencing for Appointments*.

Configure Zoom Web Conference for Your Sales Application

Here's how to integrate the Zoom conferencing application.

Before You Begin

To activate the web conference feature, you must first raise a service request from My Oracle Support who will then issue you with a promotion code. You must also have an active Zoom account and remain in agreement with the terms and conditions of your contract to successfully configure the web conference and your sales application integration. Also, note that your zoom license must include REST API support, as well as the necessary permissions to manage meetings and recordings.

> **Note:** You need the Configure Oracle Fusion Applications Offering privilege (ASM_CONFIGURE_OFFERING_PRIV) in your user role to enter the promotion code in the application.

When you receive a promotion code to activate Web Conferencing, follow these steps to enter it in your sales application.

1. Click **Navigator** > **My Enterprise** > **Enterprise** work area.
2. On the Enterprise Information page, click **Manage Promotion Code**.
3. On the Manage Promotion Codes page, click **Enter Promotion Code**.
4. On the Enter Promotion Code dialog box, enter the promotion code, and click **Save and Close**.

The promotion code you entered appears in the Part Number column on the Manage Promotion Codes page.

Once you've entered your promotion code, follow the steps to enable, integrate, and verify a web conference app for your sales application.

When you complete the integration of your Sales for Redwood application with Zoom for Web Conferencing, users can:

- Start Zoom meetings
- Verify and update meeting participants as contacts while the meeting is ongoing
- Take notes and record the meeting outcome

Summary of Setup Steps

Here's a summary of the steps to enable and integrate a web conference app for your sales organization.

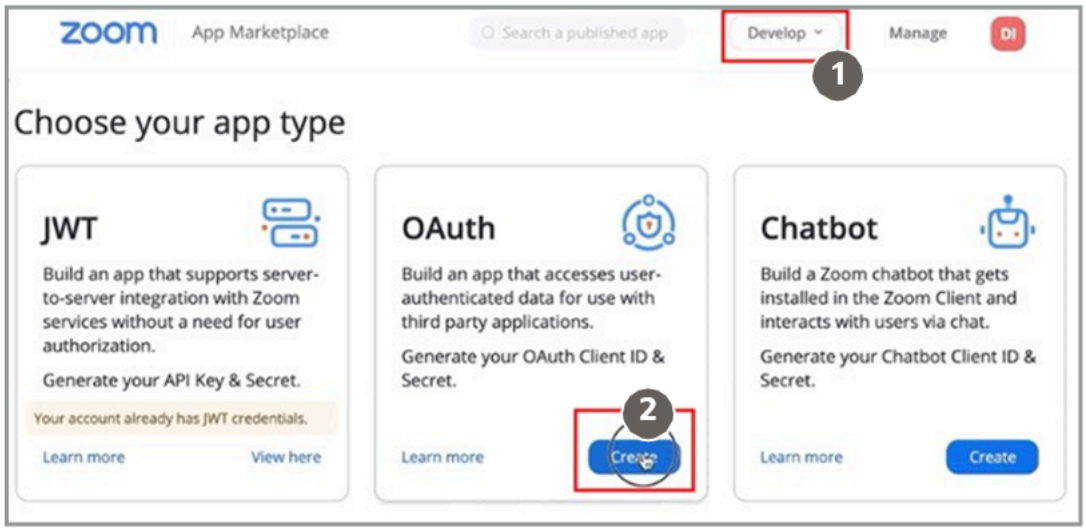
1. Create your own OAuth Application in Zoom.

   An OAuth app defines a set of Zoom APIs to allow Oracle access those APIs on your behalf. The OAuth app can be private and doesn't need to be published. For more details, see the Create an OAuth Application in Zoom section of the Configure Web Conference for Your Sales Application topic.
2. Instead of making repeated calls to pull data frequently from an API, such as a Zoom account, Webhooks retrieve the required information about events that happen. The Zoom account must install your Webhook-enabled app to authorize data flow via Webhooks. For more details, see the Enable Webhooks for Web Conference section of the Configure Web Conference for Your Sales Application topic.
3. From your Classic Sales application, navigate to the **Manage Web Conference Integration** task in **Setup and Maintenance** to complete and activate the integration. For more details, see the Complete Your Web Conference Integration section of the Configure Web Conference for Your Sales Application topic.

Create an OAuth Application in Zoom

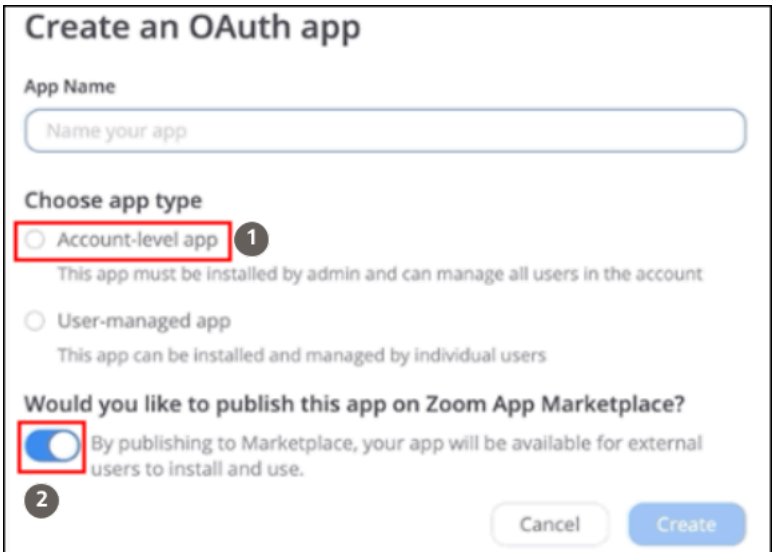
Here's how to create an OAuth application in Zoom.

1. Sign in to Zoom as a setup user with access to the Zoom Marketplace and with the necessary privileges to build apps.
2. Navigate to your profile page and select the **Advanced** drop-down option.
3. From the **Advanced** drop-down menu, select **App Marketplace**. You're redirected to the App Marketplace website.
4. Select the **Develop** drop-down menu (callout 1 in the screenshot), and then click Build App.



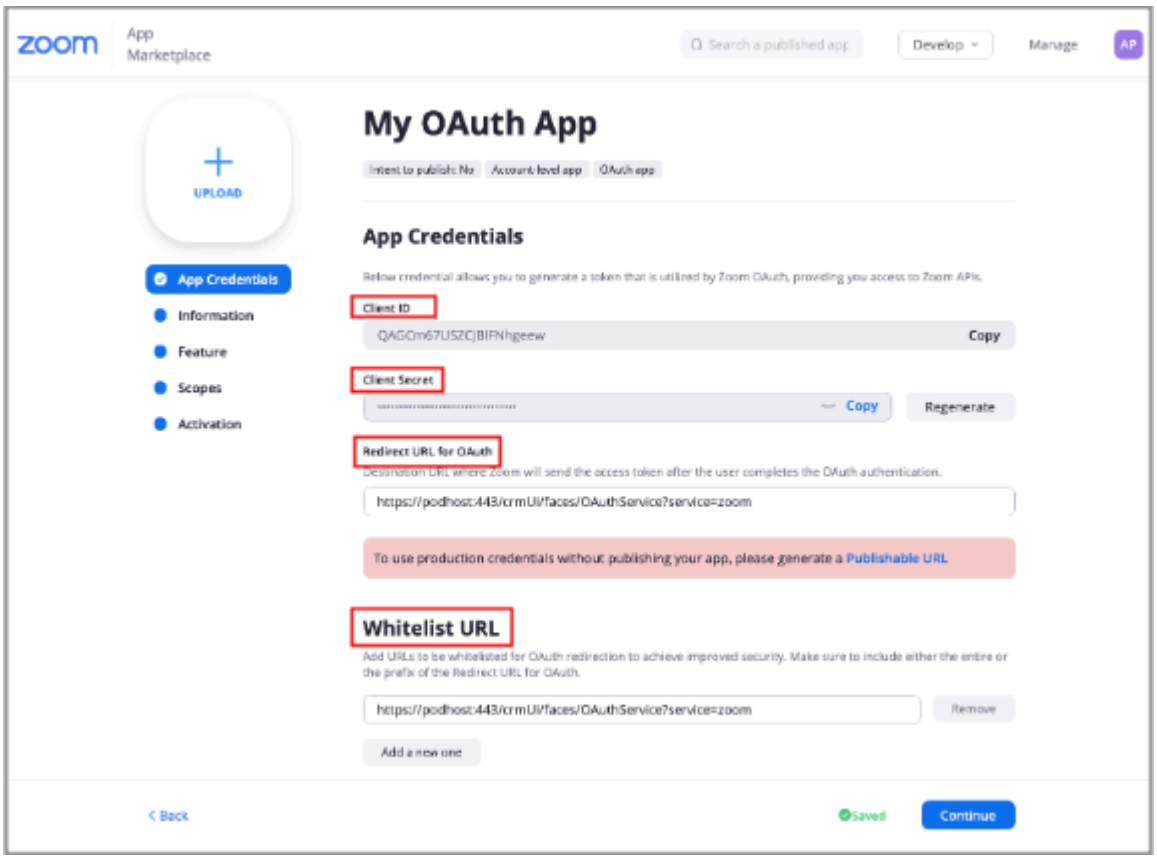
5. From the OAuth panel, click **Create** (callout 2 in the screenshot).
6. From the Create an OAuth app page, type your application name in the **App Name** field.

7. Select the **Account-level app** option (callout 1) and deactivate the **Would you like to publish this app on Zoom App Marketplace?** toggle (callout 2 in the screenshot).



8. Click **Create**.
   You're redirected to the **App Credentials** tab from where you can copy the **Client ID** and **Client Secret**.

   > **Note:** The Client ID and the Client Secret are necessary to complete and activate the Zoom integration with your sales application.



9. In the **OAuth Redirect URL** field, enter your platform destination URL where Zoom will send the access token after you complete the OAuth authentication.
10. In the **Whitelist URL** section, insert your platform full domain in the following format: `https://[podhost:podport]/crmUI/faces/OAuthService?service=zoom`.

    > **Note:** You can also get this URL from the **OAuth Redirect URL** field in the Manage Web Conference Integration task in Setup and Maintenance. See the Complete Your Web Conference Integration section below.

11. Click **Continue**.
12. In the **Information** section, complete the Basic Information for your app by entering these details:
    - App Long Name and Description
    - Your Company Name
    - Name and the Email Address of the developer in charge of the integration (as a point of contact)
13. Click **Continue** to move to the Features section where you can subscribe to the interested events to receive Webhook notifications for your app. For more information, see the section Enable Webhooks for Web Conference.
14. Click **Continue** again to move to the Scopes tab.

15. Click **Add Scopes** and select these two scope types and associated options:
    - **Meeting** - Select **View and manage all user meetings**
    - **Dashboard** - Select **View all users' meeting information on Dashboard**

    These two scope types are the extent of APIs that Oracles are allowed to use. Scopes provide a way to limit the amount of access that's granted to an app.
16. Click **Done** to complete the creation of your OAuth application in Zoom.

> **Note:** This OAuth application won't be published in the Zoom marketplace.

Enable Webhooks for Web Conference

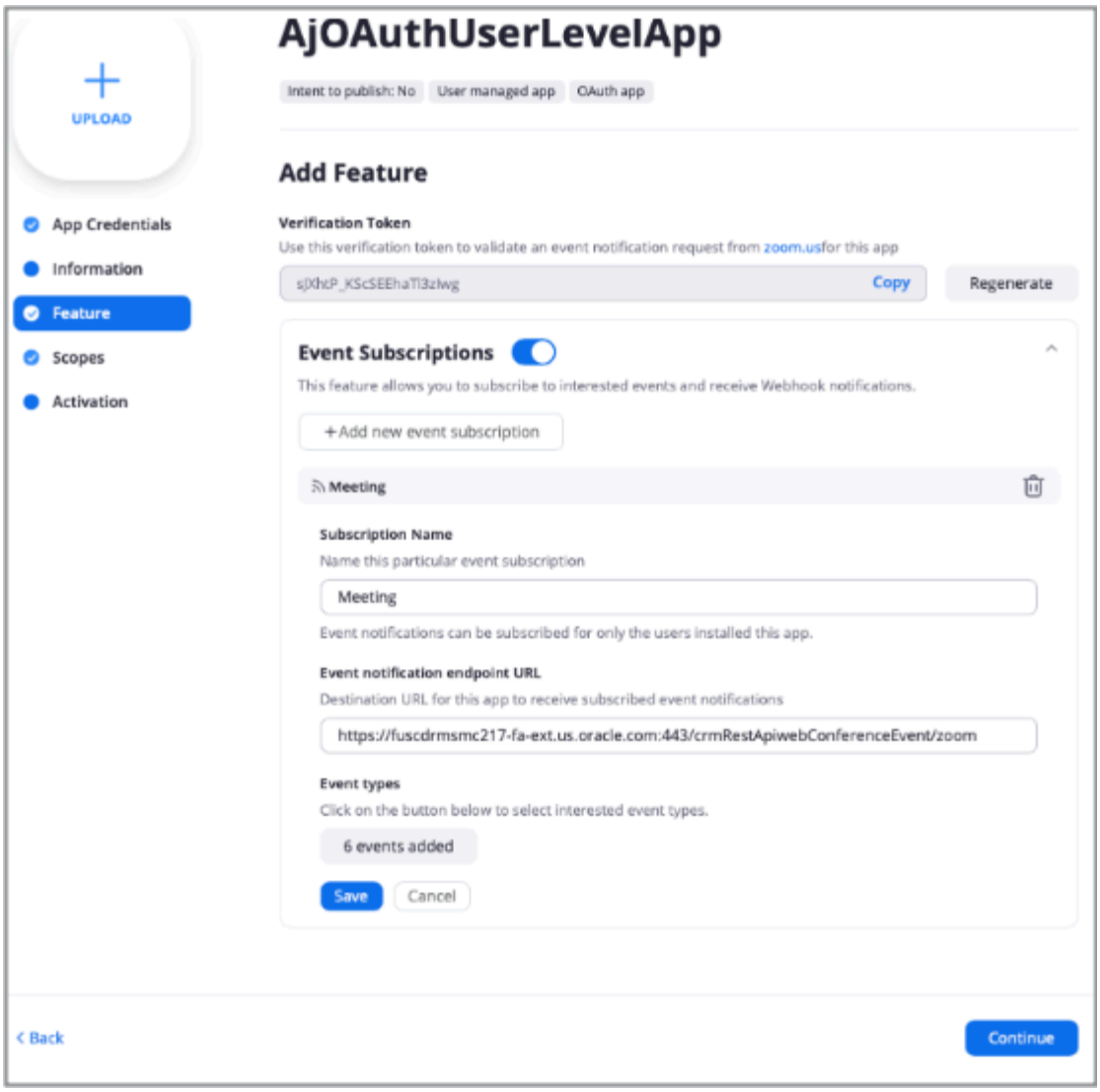
Webhooks act as a medium to notify consumer applications about events that occur in your web conference provider. For example, Zoom implements Webhooks or callbacks to notify clients about events such as when a:

- Meeting started or completed
- Participant joined or left the meeting
- Participant joined a meeting before the host
- Participant is waiting for host to start a meeting

Instead of making repeated calls to pull data frequently from an API, such as a Zoom account, Webhooks retrieve the required information about events that happen. The Zoom account must install your Webhook-enabled app to authorize data flow via Webhooks.

Here's how to enable Webhooks for an OAuth application in Zoom.

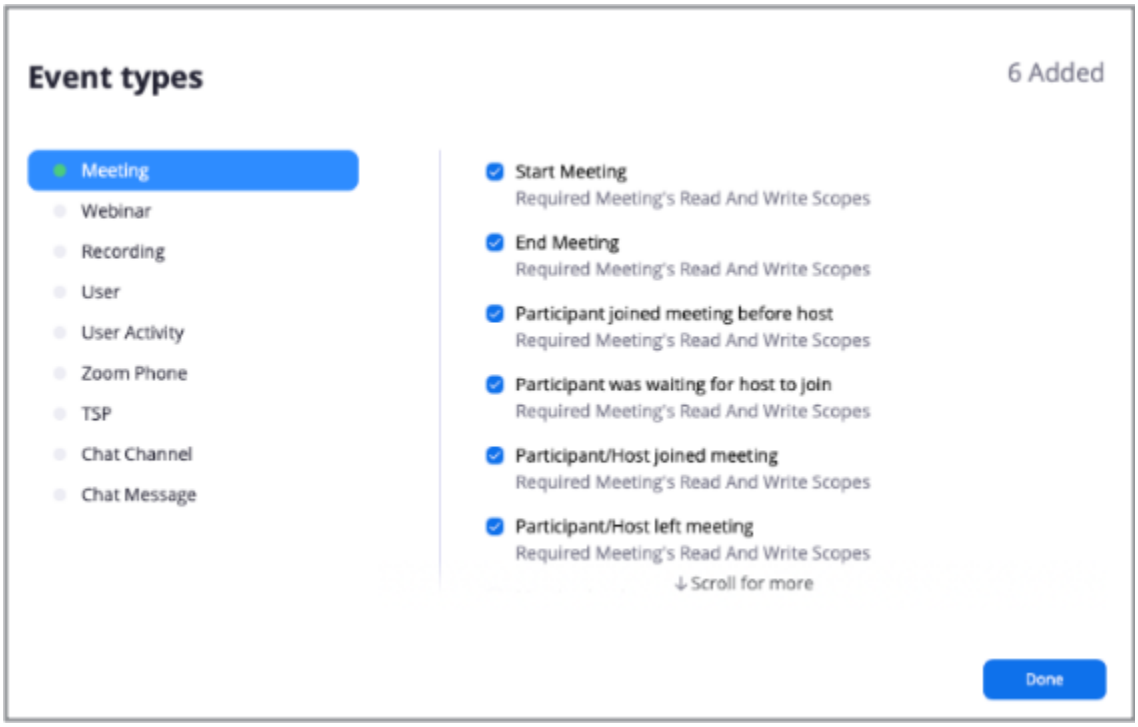
1. From the OAuth panel, click the **Feature** tab to display the **My Feature** page as follows:



2. Copy the **Verification Token** to validate an event notification request from Zoom.

> **Note:** This validation token is necessary to complete and activate the Zoom integration with your sales application. See the **Complete Your Web Conference Integration** section for more information.

3. Click **Event Subscriptions** and subscribe to the interested events to receive Webhook notifications for your app by entering these details:
    - Click **Add new event subscription** and select **Meeting**. Click the field again if you want to add additional Event Subscriptions.
    - Enter the **Subscription Name**.
    - Select the events from available **Event types** that you would like to subscribe as follows.



> **Note:** Although you can subscribe to as many events as required for each event subscription, you can only have a maximum of 10 event subscriptions per app.

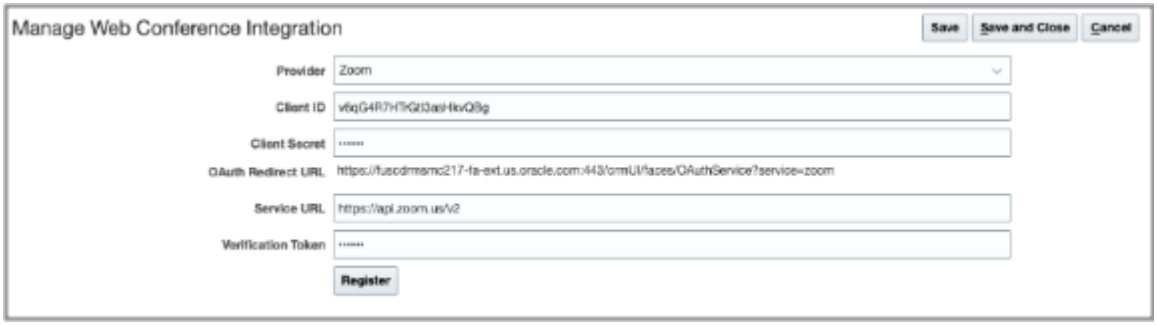
    - Enter a valid **Event Notification Endpoint URL** as shown in the following example: `https://<podhost>:<podport>/crmRestApi/webConferenceEvent/zoom`.

      This is the designated URL of your app where you receive Webhook POST requests, also known as event notifications. Event notifications are sent as HTTP POST requests in JSON to the endpoint you specify in your Marketplace app. This URL must be secured over HTTPS.
4. Click **Done** to complete the Webhook configuration of your OAuth application in Zoom.

Complete Your Web Conference Integration

You're now ready to complete and activate the Zoom web conference integration for your sales application. Follow these steps:

1. Navigate to **My Enterprise** > **Setup and Maintenance** > **Manage Web Conference Integration**. The following screen is displayed.



2. Enter the following:

Field	Value
Provider	Select Zoom from the drop-down list.
Client ID	Copy the value generated in the App Credentials section from the application created on Zoom marketplace. (See step 8 in the Create an OAuth Application in Zoom section).
Client Secret	Copy the value generated in the App Credentials section from the application created on Zoom marketplace. (See step 8 in the Create an OAuth Application in Zoom section).
OAuth Redirect URL	This pre-populated field defaults to the value you entered for the **Whitelist URL** in step 9 of the Create an OAuth Application in Zoom section. It contains your pod information in the following format: `https://[podhost:podport]/crmUI/faces/OAuthService?service=zoom`
Service URL	This pre-populated field defaults to the value you entered in step 9 of the Create an OAuth Application in Zoom section. To support GDPR requirements of EU customers, you can use this URL as the base URL for all API requests associated with EU accounts. `https://eu01api-www4local.zoom.us` For information about the Service URL, go to this URL `https://marketplace.zoom.us/docs/api-reference/introduction`

Field	Value
Verification Token	Copy the verification token value generated in the Add Feature section from the application created on Zoom marketplace. (See the section Enable Webhooks for Web Conference).

3. Click **Register** to initiate the OAuth process.

   A new window is displayed which requests your Zoom credentials.
4. Sign in with your Zoom account details and once you're successfully authenticated, you receive this message:

   `Congratulations. You have successfully registered your web conference provider.`

   > **Note:** Calls to Zoom will be made with these credentials. The email address for Sales resources will be used as the Zoom user ID.
5. Next, you're prompted to authorize the usages of the scopes you selected in step 15 in the Create an OAuth Application in Zoom section.
6. Return to the Manage Web Conference Integration page and click **Save and Close** to complete the registration.

Verify Your Setup

Here's how to verify your setup.

1. Sign in to your sales application.
2. Create an appointment of type **Web Conference**.
3. Check your Zoom web profile to verify the successful creation of your meeting in Zoom `(https://zoom.us/meeting#/upcoming)`

Remove a Web Conference

These steps describe how to remove a web conference integration from your sales application.

1. Sign in to Sales as a sales administrator.
2. Navigate to **My Enterprise** > **Setup and Maintenance**.
3. In the Setup and Maintenance work area, click the Tasks side panel icon and then click the Search link.
4. Search for and select the **Manage Web Conference Integration** task.
5. In the **Provider** field, remove the current value and leave blank.
6. Click **Save and Close**.

Enable Web Conferencing for Appointments

Enable web conferencing for appointments. This setup is required for Orchestration steps that allow salespeople to open web conferencing with the click of the Start Web Conference button.

1. In Setup and Maintenance, open the task **Manage Activity Type and Subtype**:
   - Offering: Sales
   - Functional Area: Sales Foundation

- Show: All Tasks
- Task: Manage Activity Type and Subtype

2. For the **Web conference** (WEB_CONFERENCE) entry, select the **Appointments** check box.
3. Enter a start date.
4. Click **Save and Close**.

22 Sales Assistant

Overview of Sales Assistant

Sales Assistant is a chatbot that you can use to access sales information and perform sales activities. You enter questions or commands, and the Sales Assistant retrieves the information or acts on your requests. The Sales Assistant reduces manual data entry, and makes it easier to view and update sales records through text in Microsoft Teams and through either text or voice in CX Sales Mobile.

Things to note:

- **Supported Channels:** Microsoft Teams, CX Sales Mobile
- **Supported Language:** English
- **Supported Objects:** Accounts, Appointment, Contacts, Opportunities, Service Requests, Tasks, Sales Leads, and Custom objects

  Administrators can enable or disable different objects for each channel.
- **Security:** When using Oracle Sales Assistant in Microsoft Teams, you're prompted to sign in to Sales via a sign-in button the assistant sends to you when you first converse with it. After you sign in, the assistant continues the conversation with you.

  To use Oracle Sales Assistant in CX Sales Mobile, you can use the chatbot right away after you sign in to Oracle CX Sales Mobile.

  For any channels, the same functional privilege you have in Sales applies when entering into conversations with the Sales Assistant.

Where to Get Help with Sales Assistant Setup

If you need help with enabling Oracle Sales Assistant, send a message to the Sales Assistant forum on Oracle Cloud Customer Connect. Here's the URL:

`https://cloudcustomerconnect.oracle.com/resources/dee2ff3bf7/summary`

Related Topics

- Overview of Sales Assistant Setup
- Set Up Oracle Sales Assistant for Microsoft Teams
- Set Up Oracle Sales Assistant for CX Sales Mobile

Overview of Sales Assistant Setup

Because Oracle Sales Assistant setup is different for each of the channels it's running in, this chapter is divided into different sections for each channel.

Step	Setup Task	Application	Description	Where to get more details
1	You must have completed the prerequisite Oracle Digital Assistant application setup.	Oracle Identity Cloud Service (IDCS)	Before you set up any of the features that use natural-language processing, you must perform some prerequisite setup of Oracle Digital Assistant: • Set up administrator users • Obtain the ODA URL • Install (pull) the FADigitalAssistant. • Enable the Digital Assistant used for Oracle Fusion Cloud Applications If you already completed the setup for another feature, you can skip this step.	See the topic: *Overview of Common ODA Setup for Sales*. For additional information, see the Oracle Digital Assistant documentation: *Getting Started with Oracle Digital Assistant for Cloud Applications.*
2	Check Adaptive Search setup.	Classic Sales	You must check that Adaptive Search is set up and the correct fields are enabled for Opportunity and Activity objects. • Opportunity: Status, Sales Method • Activity: Type, Activity, Start Date, End Date, Status, Due Date	*Prerequisite Adaptive Search Setup in Sales*
3	Configure the integration with Microsoft Teams	Microsoft Teams Developer Portal and Oracle Digital Assistant	For Oracle Sales Assistant for Microsoft Teams, involves creating an app in the Microsoft Teams Development Portal and a Microsoft Teams channel in Oracle Digital Assistant.	See *Set Up Oracle Sales Assistant for Microsoft Teams* for more information.
4	Configure the integration with Classic Sales Mobile	Oracle Digital Assistant and Application Composer	For Oracle Sales Assistant for CX Sales Mobile, you configure an Oracle Web Channel and hook it up to CX Sales Mobile using Application Composer.	See *Enable Sales Assistant for CX Sales Mobile* for more information.
5	Use the Common Configuration Tool to Update Synonyms	Application Composer	The Oracle Sales Assistant Common Configurations administrator tool provides an easy way for you to manage synonyms for all supported channels without having to manually manage them in Oracle Digital Assistant.	See the topic *Use the Common Configuration Tool to Update Synonyms* of the Common Configurations section for more information about adding synonyms to fields and objects (if required).

Step	Setup Task	Application	Description	Where to get more details
6	Periodically update the FADigitalAssistant skill	Oracle Digital Assistant	The CX Sales skill is updated every release and three times within each release. You should periodically update to the latest version.	See the topic: *Refresh the Digital Assistants*

Prerequisite Adaptive Search Setup in Sales

Oracle Sales Assistant uses enabled saved searches and the high-performance search capabilities powered by Adaptive Search. Before using the Oracle Sales Assistant, you must ensure that:

1. Adaptive Search is enabled in the Sales application, and that search indexing processes are run and regularly scheduled.
2. Fields are enabled in Adaptive search for these objects:
    - Opportunity - Status, Sales Method
    - Activity - Type, Activity, Start Date, End Date, Status, Due Date

    See *Make Additional Fields Searchable* and the *Implementation Reference* guide.

Validate Oracle Sales Assistant Configurations Using the System Status Tool

Use the system status tool to check if you are missing information or if you have entered incorrect data for your CX Sales Mobile and Oracle Sales Assistant configurations.

The system status tool is available from both within and outside a sandbox environment. For example, if you access the tool inside a sandbox, it checks the objects configured in the sandbox. Alternatively, if you are using the tool from outside the sandbox, it checks the objects against published configurations.

Previously, you needed to be inside a sandbox to configure the channels, but now you can configure channels for Oracle Sales Assistant outside a sandbox. This topic explains how to use the system status tool to determine if the setup for Oracle Sales Assistant is complete and ready to use from outside a sandbox.

The system status tool helps determine whether Oracle Sales Assistant is setup correctly. It also checks whether all aspects, such as REST APIs, are working as required for the sales assistant to function.

Navigate to the System Status Tool from Outside a Sandbox

Here's how to access the system status tool from outside a sandbox environment.

1. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.

2. Under the Common Setup Menu, click **Productivity Applications Configuration**.
3. Click the **Oracle Sales Assistant** tab to enter your channels configuration.

   > **Note:** Click the **CX Sales Mobile** tab to open the System Status tool and view the current status of the CX Sales Mobile configuration.

4. Click **Save Configuration** and the system status page is displayed showing the current status of your channel configurations.

Navigate to the System Status Tool within a Sandbox

Here's how to access the system status tool from inside a sandbox environment.

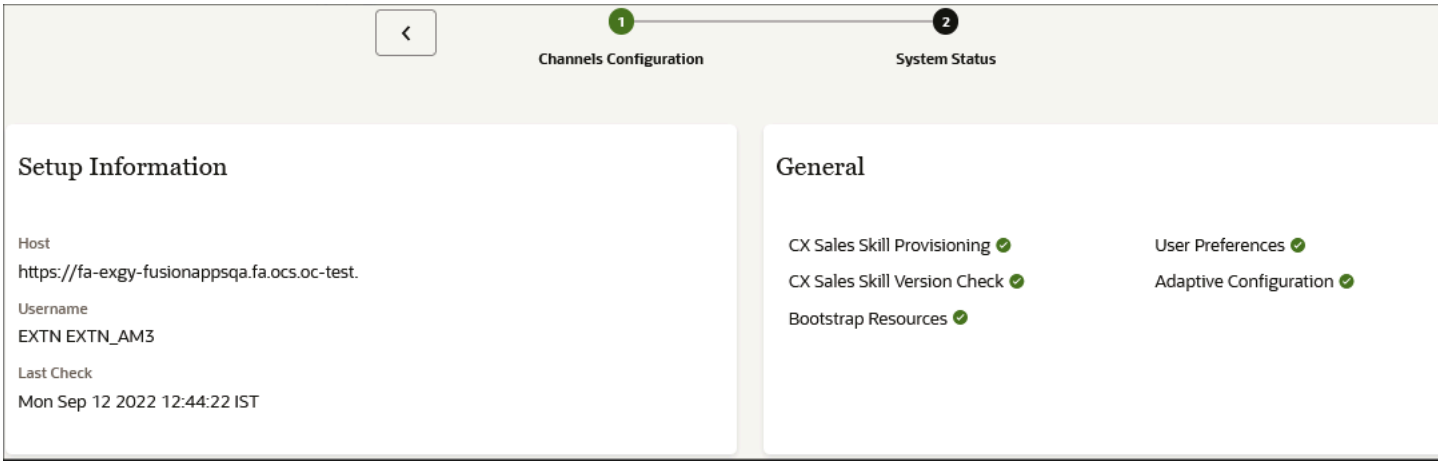
1. Sign in to the Sales application as a user with a Sales Administrator role.
2. Select or create a sandbox that you want to use for your configurations. Make sure that your sandbox includes Application Composer as an active tool.
3. Open Application Composer by selecting **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, click **Oracle Sales Assistant Setup**.
5. Click the **System Status** tab to open the system status tool.

Check the System Status of Your Configuration

The system status page contains a summary of the setup information such as host, user name, and the time and date of the last system check. The results section displays the status of the requests that were checked and you can filter by all requests or view only request that failed.

To check the status of your Oracle Sales Assistant:

1. From the Channels Configuration page, click **System Status**.



2. View the **Setup Information** section as follows:
   - Host
   - Username
   - Last Check
3. Check the **General** section which displays the summary status of the following general items for the sales assistant setup. Note that general checks aren't related to specific objects.
   - CX Sales Skill Provisioning

Checks if the provisioning is correct for the environment by invoking the list skill API. An error indicates that there's an issue with the Oracle Digital Assistant provisioning and you must raise a service request (SR) with the support team.

- CX Sales Skill Version Check

  Checks the Sales skill version. The Oracle Digital Assistant list skill API only returns skills whose skill versions match FA version, which can be used for this validation. If the list returned is empty, then this checks to see if there is any available valid skill.
- Bootstrap Resources

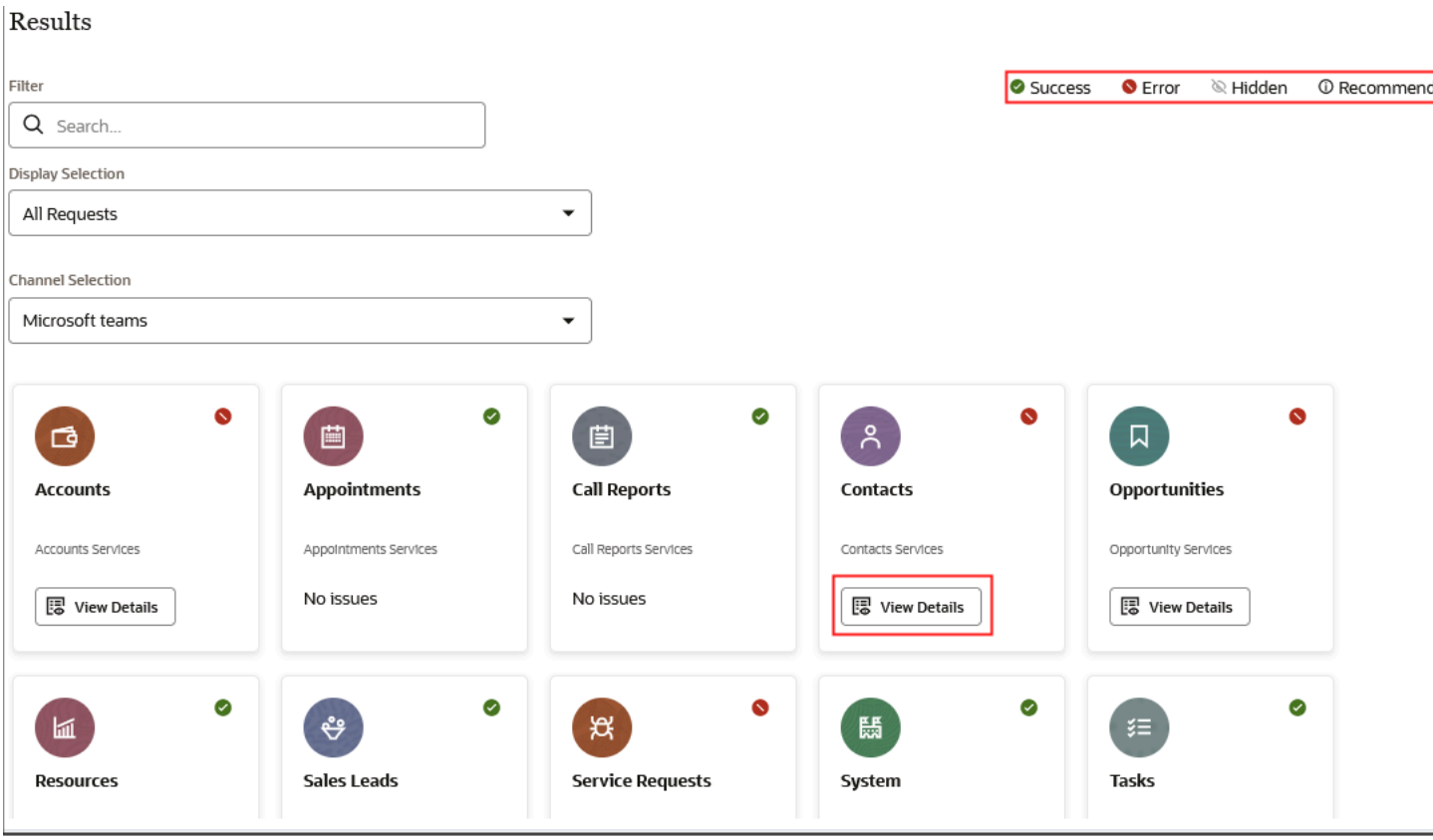
  Checks if REST APIs are working successfully in your environment.
- User Preferences

  Checks if user preference values such as user display name, region, date format and so on can be successfully retrieved.
- Adaptive Configuration

  Checks if the Adaptive Search REST API is working successfully and is able to retrieve the available list of objects which are indexed for Adaptive Search.

4. Click **Channel Selection** to filter objects based on the channel selected.
5. View the status results from the Results section to view checks for the configured objects.

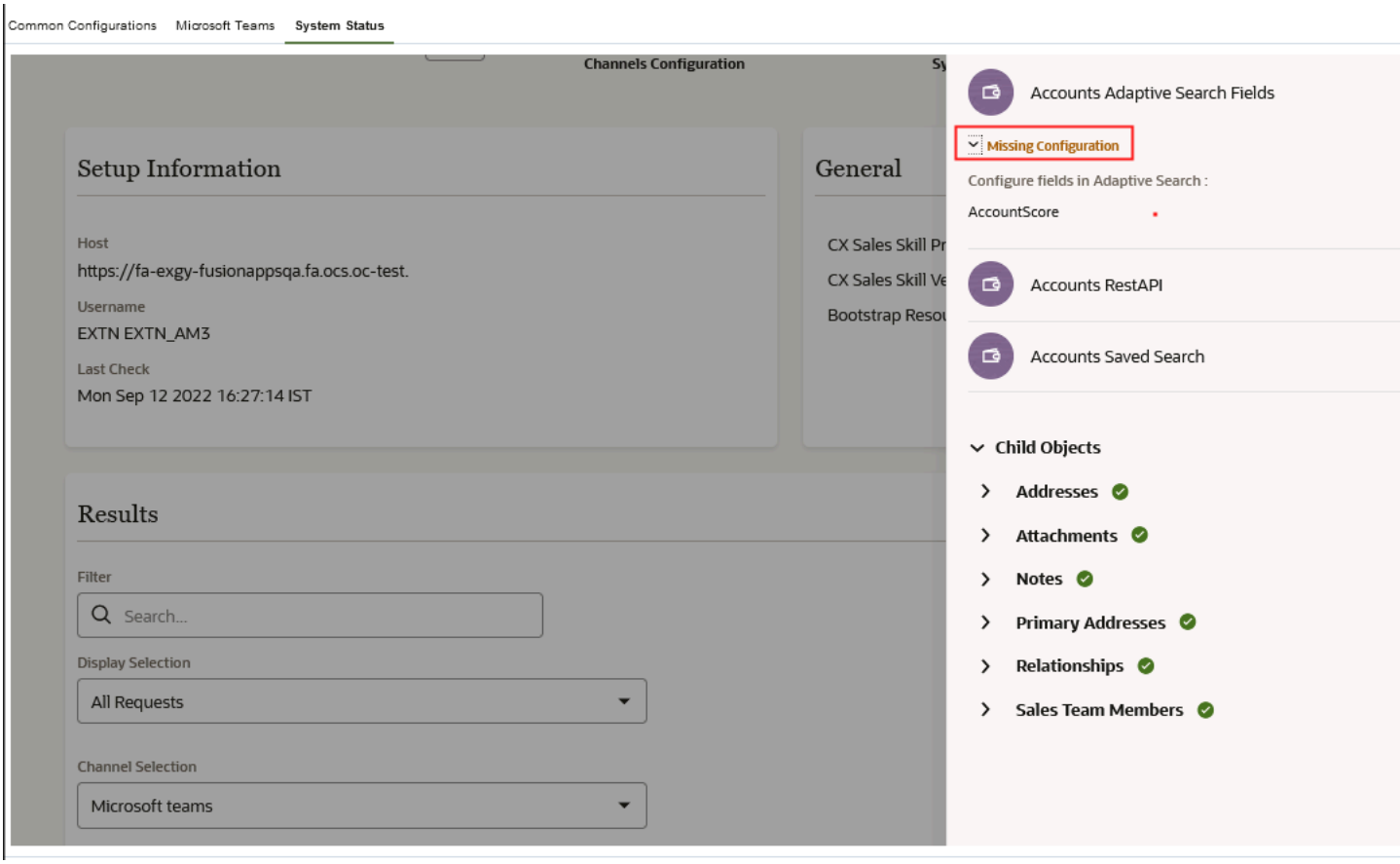
> **Note:** If you are using the system status tool from inside a sandbox, it checks the objects configured in the sandbox. If you accessed the tool from outside a sandbox, then checks are performed on those published configurations.



6. Click **View Details** to display a drawer with additional information for a request that has an error status.

> **Note:** If an object has any issue, then the **View Details** is displayed. If the object has no issues, then **No Issues** is displayed.

Here are a few examples of some checks that the system status tool performs. If there's an object that is enabled but does not have synonyms added to it, then an error will be displayed for the object. Also, if there are fields that have synonyms but not enabled for Adaptive Search, then an error is displayed for the object. Here's a sample of the error details screen.



Any requests that aren't correctly configured are marked accordingly so you can easily tell what areas needs to be configured based on the status as follows:

Status	Description
Success	The Success icon means this item passes all validations and no issues are found.
Error	The Error icon means this item doesn't pass all validations. This can be caused by either the request to the server itself fails or some fields are configured incorrectly.
Hidden	The Hidden icon indicates that the request is hidden in the Navigator.
Recommended	The Recommended icon means this item is not configured as recommended. Although this doesn't affect the application's functionality, you should configure the item as suggested.

FAQs for Sales Assistant

Can I configure channels for Oracle Sales Assistant outside a sandbox?

Yes. You no longer need to create and publish a sandbox to configure channels for your sales assistant.

In addition, you can use the system status tool to help validate if the configurations for Oracle Sales Assistant are all completed and the assistant is ready to use.

Related Topics

- Validate Oracle Sales Assistant Configurations Using the System Status Tool

Microsoft Teams

Set Up Oracle Sales Assistant for Microsoft Teams

Enabling Oracle Sales Assistant in Microsoft Teams involves creating an app in the Microsoft Teams Development Portal and a channel in Oracle Digital Assistant.

1. Create an app using the Developer portal in Microsoft Teams, and add a bot to the app.

   Ensure that you set the following 2 options:
   - Under the Messaging bot section, select **My bot supports uploading and downloading files**
   - Under the Scope section, select **Personal**
   - > **Note:** You can create an app using many different ways as outlined in the Microsoft Teams chapter in the Using Oracle Digital Assistant guide.

2. Create a channel in Oracle Digital Assistant using the bot ID and password from the bot registration as follows:
   a. In a separate browser window or tab, open Oracle Digital Assistant, click Channels in the left menu, and choose Users.
   b. Click **+ Channel** to open the Create Channel dialog.
   c. Enter a name for your channel.
   d. Select **Microsoft Teams** as the channel type.
   e. Enter the **Microsoft Application Id** with the Microsoft Bot ID that you obtained when you created your bot registration in the Developer portal in Microsoft Teams.
   f. Enter the **Microsoft Application Password** with the client secret that you obtained from your bot registration.
   g. Click **Create.**
   h. From the Channels page, copy the WebHook URL and paste it somewhere convenient on your system.

i. Click the **Route To** icon and from the drop down, select the Oracle Digital Assistant or skill that you want to associate with the channel.
j. Select **Channel Enabled**.

3. Copy the WebHook URL that was generated when you created the channel and add it to the bot registration in Microsoft Teams.
4. Test your Oracle Digital Assistant through the Chat window in Microsoft Teams.

Overview of Extending Sales Assistant for Microsoft Teams

Microsoft Teams Composer is an easy-to-use interface designer tool in Application Composer that lets you configure the Oracle Sales Assistant chatbot for Microsoft Teams channel users. It helps you manage which objects and fields are visible in the chatbot.

You can create conditions to define when a page layout displays, without having to carry out specific configurations. You can add your own custom objects to the chatbot using Microsoft Teams Composer and add page layouts in the same way that you can with standard sales objects.

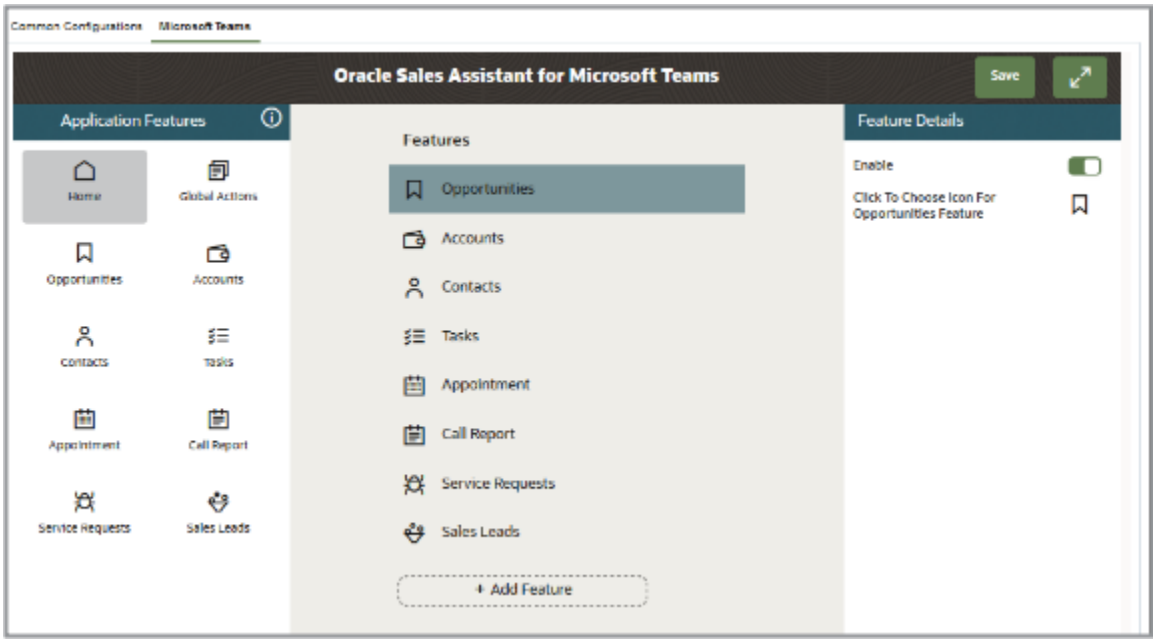
You can add a role to a chatbot feature's List, Summary, and Edit layout. For example, a user with the Sales Manager role might want to see certain fields on an opportunity record that other sales team members won't need. You can assign geographical regions to a page layout, which will restrict a page layout's availability to users from your selected set of geographical regions. For example, you might want to configure a summary layout based on the Sales Representative and Sales Manager roles, for Canada, based on an expression where the amount is less than $200,000 and the win probability is greater than 50%.

To use this feature, you must have Oracle Sales Assistant implemented for Microsoft Teams. You can enable or disable the objects available on the channel, which means that Microsoft Teams channel users of Sales Assistant can also view information about custom objects.

> **CAUTION:** You can only configure the latest skill from the skill store that matches your current release. For example, if the skill you want to modify is from a previous release and you're making your changes in a later release, then you must re-base the skill your users are using to the latest skill that was modified. In addition, you must re-route the channel to the new re-based skill so that users can start using it and perform Reset sessions in the channel UI.

> **Note:** If you need help with enabling Oracle Sales Assistant, send a message to the Sales Assistant forum on Oracle Cloud Customer Connect. Here's the URL: `https://cloudcustomerconnect.oracle.com/resources/dee2ff3bf7/summary`

Access the Microsoft Team Composer tool from the Oracle Sales Assistant Setup node under the Common Setup section of Application Composer.



Note: Oracle Sales Assistant for Microsoft Teams utilizes the saved searches enabled in Workspace and the high-performance search capabilities powered by Adaptive Search. See the Implementation Reference guide for more information about Adaptive Search and setting up Workspace saved searches.

Navigate to Microsoft Teams Composer

You can configure custom sales assistant layouts to display data by role, region, or other criteria for Microsoft Teams channel users. Using the Microsoft Teams Composer configuration tool, you can add, remove, and rearrange standard or custom fields to suit your business requirements.

Navigate to the Microsoft Teams Composer Tool

Here's how to navigate to Oracle Sales Assistant for Microsoft Teams.

1. Select or create a sandbox that you want to use for your configurations. Make sure that your sandbox includes Application Composer as an active tool.
2. Open Application Composer by selecting **Application Composer** under the Configuration category in the Navigator menu.
3. Under the Common Setup Menu, click **Oracle Sales Assistant Setup**.
4. Click the **Microsoft Teams Composer** tab to open the Oracle Sales Assistant for Microsoft Teams configuration tool.

On the left-hand side of the configuration tool, you can see the Application Features pane which lists the standard and custom objects that are enabled for Oracle Sales Assistant for Microsoft Teams in the current sandbox. The standard objects include:

- Accounts
- Appointment

- Call Report
- Contacts
- Opportunities
- Tasks
- Sales Leads
- Service Requests

When you click **Home** you have the option to enable or disable an object, or choose a different icon for an object.

The center pane lists the predefined objects or other objects that were added for Oracle Sales Assistant for Microsoft Teams. You can see at a glance those objects that are enabled and those objects that are deactivated are denoted by an icon. Scroll to the bottom of the page and you see the **+ Add Feature** button, which let's you add custom objects to Oracle Sales Assistant for Microsoft Teams.

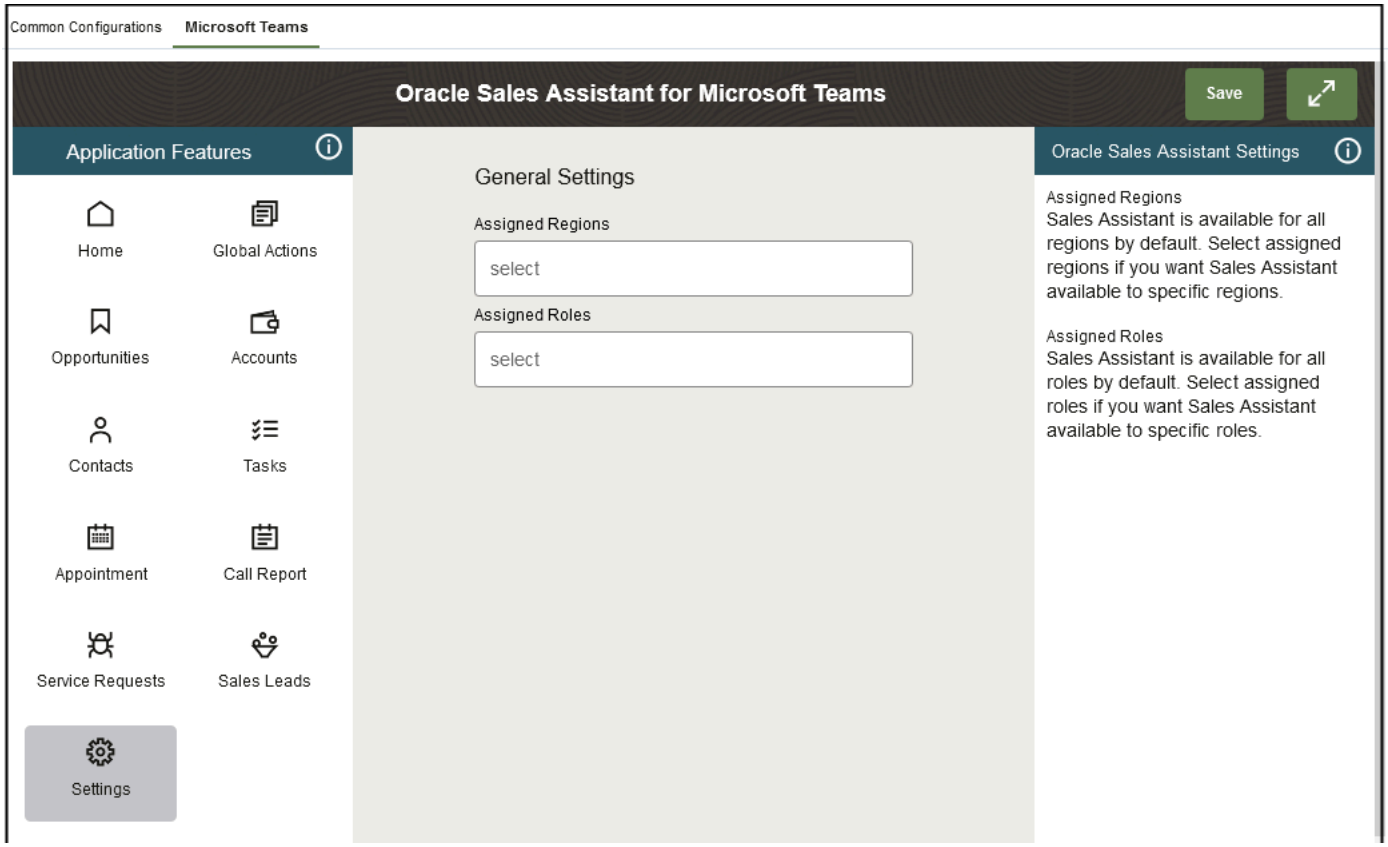
> **Note:** If you're adding a custom object, ensure that the **Include in Service Payload** option is enabled for an object in Application Composer. For details about how to do this, see the Add Objects and Fields chapter in the Configuring Applications Using Application Composer guide.

Assign Roles and Regions to Access Oracle Sales Assistant via Microsoft Teams

You can assign roles and regions to have access to CX Sales using Oracle Sales Assistant in Microsoft Teams. This gives you the flexibility to allow users with specific roles and in specific regions to have a conversation with the sales assistant.

If there are no roles and regions selected for the Assigned Roles and Assigned Regions fields, then Oracle Sales Assistant will be available to all Oracle Sales users.

1. Navigate to the Oracle Sales Assistant for Microsoft Teams configuration tool.



2. In the Application Feature pane, click **Settings**.
3. From the General Settings pane, select the regions you want from the Assigned Regions drop-down list.

   If you add two regions (region A and region B), the sales assistant will be available for users in region A or in region B.
4. Next, select the roles you want from the Assigned Roles drop-down list.

   If you add one role and one region, the sales assistant will be available for users with that role and in that region. However, if you add two roles and two regions, users with either one of the roles (role A or role B) in either one of the regions (region A or region B) can use the assistant.
5. Click **Save**.

Enable Attachments and Notes for Microsoft Teams

The Enable Attachments is selected by default and allows you to ask to view or upload attachments to your record. The Enable Notes is also selected by default and allows you ask to view or add notes.

For example, you can ask the assistant to attach a file to the object's records for those objects that have an attachment as a child object. When enabled, it will launch the attachment form for you to share notes, photos, videos, documents, or files from Oracle Sales Assistant for Microsoft Teams to CX Sales records.

You can also ask the assistant to add a note for any object that has notes as a child object. The assistant prompts you for the note details to add to the record you want.

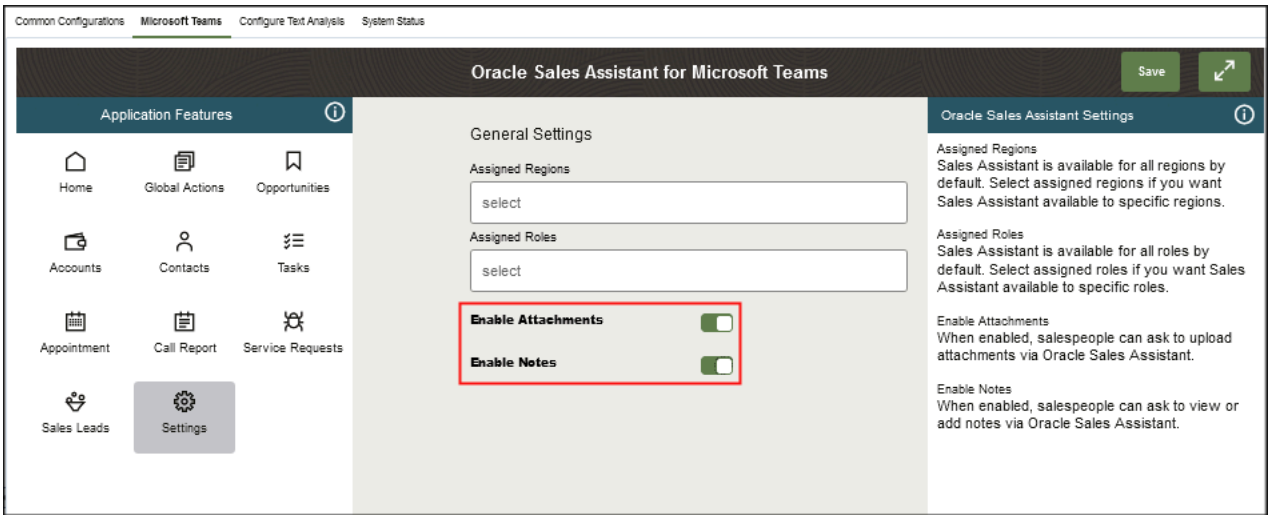
Here's how to enable attachments and notes from the Microsoft Team tool in Application Composer.

1. Sign in to the Oracle CX Sales application as a user with a Sales Administrator role.
2. Create a new sandbox to use for your configurations.
3. Select **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click **Oracle Sales Assistant Setup**.
5. Click the **Microsoft Teams** tab.
6. In the Application Features pane, click **Settings**.
7. The **Enable Attachments** toggle is selected by default and allows you to ask to view or upload attachments to your record. The **Enable Notes** toggle is also selected by default and allows you ask to view or add notes.

   > **Note:** If you don't have access to attachments or notes in Oracle Sales, you won't be able add attachments or notes and won't be able to get any notes via Oracle Sales Assistant.

8. Click **Save**.

Here is a sample screenshot of the general settings highlighting the **Enable Attachments** and **Enable Notes** options.



About Page Layouts for Standard and Custom Objects

If you want to change the standard layout for an object for Oracle Sales Assistant for Microsoft Teams, you can create a new page layout and configure it to suit your company's requirements.

There are three different types of page layouts that you can create:

- List layout
- Summary layout
- Edit layout

Here are the basic configuration steps to make simple changes to Oracle Sales Assistant for Microsoft Teams layout pages:

1. In the Application Features pane, click the standard or custom object that you want to create a layout for.
2. Select the relevant type of page layout, such as the List, Summary or Edit.
3. In the Layouts pane, click the **Click to Clone** icon for the standard layout and enter a layout name.
4. Click **Ok**.
5. Change the fields that appear by clicking the relevant field and selecting a new field from the list.
6. You can remove fields by clicking the field and then clicking the cross icon.
7. To move a field, just drag it to the location where you want it to appear.
8. Click **Save** in the top right-hand corner of the Microsoft Teams Composer page.

   > **Tip:** Before saving, you can click the Preview tab to preview how the changes will display on Microsoft Teams.

9. Test and publish your new page layouts. See the Test Your Oracle Sales Assistant for Microsoft Teams topic for details about how to check your page layout configuration changes.

If you want to make more extensive changes to a page layout, familiarize yourself with the additional capabilities of the different types of page layout.

The List Page Layout

The List page layout displays a list of an object's records, with each record showing a set of fields that can be configured. Here are the points to note about configuring the List page layout:

- You can change the fields, remove fields, and move fields using the steps in the Create Your Own Page Layout for a Feature Using Microsoft Teams Composer topic.
- The list layout contains 3 sections, Title, Contextual and Detail. In the Contextual and Detail sections, you can add up to five fields. Click on add field to select a field for the object. Once a field is added, click add field again to select another field and the pane shows two fields and a separator. You can rearrange the fields on each row by clicking and holding the field to move it to a new position.
- Roles and geographical regions can be assigned to List page layouts. These enable you to restrict who can view the page layout by their role and their geographical region. You can find more details about how to do this in the Define Criteria for a Feature's Page Layout topic.

Make sure that you click **Save** in the Microsoft Teams Composer tool page before creating another page layout.

Test and publish your new page layout. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your configuration.

The Summary Page Layout

The Summary page layout displays an object's details. There are six sections to the Summary layout consisting of a top section that provides the object's contact information and top-level information of your choice, information sections, and child and actions related object sections.

The sections of the summary layout are as follows:

- The top section is the Header section (fields are standard and you can't add additional fields to this section).
- The Information Section consists of one or many Info1 sections, owner and primary contact (you can rearrange the sections as required).
- Child object section (you can add child objects and rearrange child objects within the child objects section)

- Actions section (this is always placed at the end and depends on the selected object). Some objects have actions and some don't. All action show up as buttons on the card.

Here are the points to note about configuring the top section:

- You can change the fields, remove fields, and move fields using the steps in the Create Your Own Page Layout for a Feature topic.
- You can't move the top section, because this section is designed to contain the top-level information for the object.

Here are some points to note about the information section:

- Displays Info 1 section, Owner, and Primary contact sections. Note that not all objects has Owner and Primary Contact sections. For example, both Opportunity and Account objects have Primary Contact and Owner, the Contact object has Owner, and Service Request has Primary Contact.
- You can add as many Info 1 sections as required and each Info 1 section shows up as its own section. The section is named Info1 section because you can add 1 field per row.
- You can reorder any of the sections by using the blue up and down arrows.
- You can add fields by clicking the **+ Add Field** button at the bottom of each section. There's no limit as to the number of fields you can add.
- You can add Info 1, Owner, and Primary contact sections by clicking the **+ Add Section** button.
- You can change the fields, remove fields, and move fields using the steps in the Create Your Own Page Layout for a Feature topic.

The section for adding child and related objects is at the bottom of the Summary page layout. Child objects such as notes, attachments, or in the case of the Opportunity object, products, and competitors are supported only for the Summary layout. If the object has other related objects, those can't be added to the summary card.

- This section can't be moved, however you can add as many child and related objects as you require by clicking **+ Add Child**.
- When you add a child or related object, the child object section displays on the left pane of the summary card. Click the child object and the screen to modify the list view is displayed. Note that only the first two sections of the list card will be displayed on the summary card. The full list layout on the top level object's summary card isn't displayed. See the Child Object Page Layouts section of this topic for more information.

Other configuration options for the Summary page include:

- Assign roles and geographical regions to Summary page layouts. These enable you to restrict who can view the page layout by their role and their geographical region. You can also define a set of conditions that have to be met before the page layout is displayed. For example, if you create criteria as follows: `Win probability is Greater than 50%`, then any opportunities with a win probability greater than 50% will use your layout. You can find more details about how to set these up in the Define Criteria for a Feature's Page Layout topic.

Make sure that you click **Save** in the configuration tool page before creating another page layout.

Test and publish your new page layout. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your mobile configurations.

The Edit Page Layout

When you create an object using Oracle Sales Assistant (OSA), the default action is that the assistant only prompts for values of required fields that have no default values. Here are the points to note about configuring the Edit page layout:

- Edit page layouts is available for Task, Appointment, and Call Report objects only.
- You can change the fields, remove fields, and move fields using the steps in the Create Your Own Page Layout for a Feature Using Microsoft Teams Composer topic of this chapter.
- The order of the questions asked during the create is based on the order of the fields in the edit layout. To move a field, just drag it to the location where you want it to appear.
- By default, when you create an object, the assistant only prompts for values of fields on the edit page layout that are required and have no defaults values. However, if you would like the assistant to prompt for additional fields that aren't mandatory, or mandatory and have a default, then you can select the fields in the "Prompted Fields on Assistant Create" section on the left hand side of the tool. Any fields selected in this section will always be prompted during conversational create if the field is part of the edit layout. The fields selected in this section applies to the predefined standard or custom layouts.
- You can also assign roles and geographical regions. These enable you to restrict who can view the page layout by their role and their geographical region. You can also define a set of conditions that have to be met before the page layout is displayed. For example, if you create criteria as follows: `Win probability is Greater than 50%`, then any opportunities with a win probability greater than 50% will use your layout. You can find more details about how to set these up in the Define Criteria for a Feature's Page Layout topic.

Make sure that you click **Save** in the configuration tool page before creating another page layout.

Test and publish your new page layout. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your mobile configurations.

Child Object Page Layouts

You can only add child objects to the Summary page layouts, but you can also create page layouts for the child objects themselves.

Here are points to note when configuring page layouts for child objects:

- Note and Attachments are special child objects that can't be extended or modified.
- Only predefined child objects layouts are displayed under the Child object section.
- When you add a child object to a parent object's page layout, the child object is added to the Children pane. To create a page layout for the child object, click the child object and clone the standard page layout, as you would for the parent object.
- Configuring a child object page layout is the same as configuring a parent object's page layout, so you can follow the same steps you're already familiar with in this topic.
- The template that's used for the list view for top level objects page layout is selected when you add the child object to a parent page. You can then further configure the List page when you select the child object and clone the standard page layout.
- You can assign roles and geographical regions to child object page layouts. You can also assign criteria for displaying the list page layout. Child object layouts only supports list layouts for now and advanced criteria isn't supported for list layouts.

Ensure that you test and publish your new page layouts. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your configuration.

About Page Layouts for Global Actions

You can create Sales Briefing layouts for specific roles, including custom roles, by either hiding or displaying the information related to pipeline, tasks or appointments for the particular role.

This can be particularly useful for sales managers who don't have a pipeline and so don't want to see blank pipeline information on their home page. You can also define the definition of pipeline based on Workspace saved searches.

Here's how you configure the Sales Briefing response:

1. In the Application Features pane, click **Global Actions**.
2. In the Layouts pane, click the **Click to Clone** icon to create a new Sales Briefing layout.
3. Enter a layout name and click **Ok**.

   All the Sales Briefing information is displayed by default. You can hide specific information from the Edit Layouts pane by clicking the **Show** icon to enable or disable the information on the card.

   You can also add a saved search to the pipeline card by clicking the Actions menu (3 horizontal dots icon) beside the pipeline row.

   > **Tip:** If you want to assign a role to your Sales Briefing layout, add the role in the Assigned Roles pane.

4. Click **Save**.
5. Test and publish your new page layouts.

See the "Test Your Oracle Sales Assistant for Microsoft Teams" topic for details about how to check your page layout configuration changes.

Create Your Own Page Layout for a Feature Using Microsoft Teams Composer

This procedure shows you how to create a Summary page layout for an Oracle Sales Assistant for Microsoft Teams feature but you can also use this procedure to help create List and Edit page layouts as well.

Creating your own layout enables you to select the fields your users will see for a feature's view using Microsoft Teams.

> **Tip:** You can also specify which user roles can view a particular layout, create criteria that have to be met to display the layout, and specify which geographical regions can view the layout.

1. Sign in to the Oracle CX Sales application as a user with a Sales Administrator role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, click **Oracle Sales Assistant Setup**.
5. Click the **Microsoft Teams Composer** tab to open the Oracle Sales Assistant for Microsoft Teams configuration tool.
6. In the **Application Feature** pane, click the feature that you want to create a layout for.
7. Select the relevant type of page view, such as the summary, list, or edit view.
8. In the Layout pane, click the **Click to Clone** icon for the Standard layout and enter a layout name.

9. Click **Ok**.
10. Select the **Active** tick icon if it's not already selected.
11. In the **Edit Layout** pane add fields to the Summary layout page, for example, by clicking **+ Add Field** in the **Info 1 Section**.
12. Select the field that you want to add to the Summary layout and then select a label, if one exists.

    > **Note:** You can remove fields by clicking the field you want to delete and then click the cross icon.

13. You can move fields by clicking the field and moving it to your preferred location.
14. For the Summary layout, click the **+ Add Action** and select which user actions you want to display or hide using the toggle buttons.
15. Click **Save** in the Microsoft Teams Composer page.
16. Test and publish your new page layouts. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your configurations.

Assign Roles to Page Layouts

You can add a role to an Oracle Sales Assistant for Microsoft Teams page layout. You can also add a role to an application feature's relevant type of page view, such as the summary, list or edit view.

For example, a user with the Sales Manager role might want to see certain fields on an opportunity record that other sales team members won't need.

> **Note:** You can assign a role when you create a custom object layout. For example, you can also assign advanced criteria for custom object summary layouts. Custom features are created when you create a custom object in Application Composer, and they're selected from the Available Features pane.

Here are the steps to assign a role to an Opportunity Summary layout using Microsoft Teams Composer and display the new layout in the Oracle Sales Assistant for Microsoft Teams application.

1. Navigate to the Oracle Sales Assistant for Microsoft Teams configuration tool.
2. In the Application Feature pane, click the feature that contains the page layout that you want to add roles to. In this example, expand the Opportunities subheader.
3. Select the relevant type of page view, such as the summary, list or edit view. In this example, select the Summary view.
4. In the Layouts pane, select the relevant page layout, or create a new page layout (see the Create Your Own Page Layout for a Feature Using Microsoft Teams Composer topic for details about how to create a page layout).
5. Expand the **Assigned Roles** pane, and select the roles you want to add.

    > **Note:** You can remove a role by clicking the Remove (X) icon.

6. Click **Save**.
7. Check that your changes appear in your CX sales application. Sign in as a Oracle Sales Assistant for Microsoft Teams user and view your changes by sending "refresh metadata". Then send the utterance to get the record for the layout. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your changes.
8. When you're happy with your changes, publish your sandbox to distribute your configurations to all Oracle Sales Assistant for Microsoft Teams users.

Related Topics

- Create Your Own Page Layout for a Feature Using Microsoft Teams Composer
- Test Your Oracle Sales Assistant for Microsoft Teams Configuration

Assign Regions to Page Layouts

Adding geographical regions to a feature's layout enables you to restrict its availability to users from a selected set of geographical regions.

For example, if you add the United States and United Kingdom regions to a page layout, then only users from these countries can view the page layout. You can assign a region when you create a custom object layout.

Here are the steps to assign a geographical region to an Opportunity Summary layout using Microsoft Teams Composer and display the new layout in the Oracle Sales Assistant for Microsoft Teams application.

1. Navigate to the Oracle Sales Assistant for Microsoft Teams configuration tool.
2. In the Application Feature pane, click the feature that contains the page layout that you want to add regions to. In this example, expand the Opportunities subheader.
3. Select the relevant type of page view, such as the summary, list, or edit view. In this example, select the Summary view.
4. In the Layouts pane, select the relevant page layout, or create a new page layout (see the Create Your Own Page Layout for a Feature Using Microsoft Teams Composer topic for details about how to create a page layout).
5. Expand the **Assigned Regions** pane, and select the regions you want to add.

   > **Note:** Select as many regions as you require. You can remove a region by clicking the Remove (X) icon.

6. Click **Save**.
7. Check that your changes appear in your CX sales application. Sign in as a Oracle Sales Assistant for Microsoft Teams user and view your changes by sending "refresh metadata". Then send the utterance to get the record for the layout. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your changes.
8. When you're happy with your changes, publish your sandbox to distribute your configurations to all Oracle Sales Assistant for Microsoft Teams users.

Related Topics

- Create Your Own Page Layout for a Feature Using Microsoft Teams Composer
- Test Your Oracle Sales Assistant for Microsoft Teams Configuration

Define Criteria for a Feature's Page Layout

Creating criteria enables you to define a set of conditions that have to be met before the page layout is displayed for a feature's Summary views.

For example, if you create criteria for an Opportunity Summary layout as follows: `Win probability is Greater than 50%`, then any opportunities with a win probability greater than 50% will use your layout in the Summary view.

> **Note:** You can't create criteria for a feature's List view.

This procedure shows you how to create criteria for an Oracle Sales Assistant for Microsoft Teams feature's page layout.

1. Navigate to the Oracle Sales Assistant for Microsoft Teams configuration tool.
2. In the Application Feature pane, click the feature that contains the page layout that you want to add roles to. In this example, expand Opportunities.
3. Select the relevant type of page view, such as the summary or edit view. In this example, select the Summary view.
4. In the Layouts pane, select the relevant page layout, or create a new page layout (see the Create Your Own Page Layout for a Feature Using Microsoft Teams Composer topic for details about how to create a page layout).
5. In the Advance Criteria pane, click **Add**.
6. Create your criterion by selecting a field, operator, and then entering the relevant field value.

   > **Note:** You can't select a field value from a list of values, so enter the field value.

7. To add a conditional statement click **Add** and select **AND** or **OR**. Enter the field, operator, and relevant field value.
8. Click **Save**.
9. Check that your changes appear in the CX Sales application. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your changes.
10. When you're happy with your changes, publish your sandbox to distribute your configurations to all Oracle Sales Assistant for Microsoft Teams users.

Related Topics

- Create Your Own Page Layout for a Feature Using Microsoft Teams Composer
- Test Your Oracle Sales Assistant for Microsoft Teams Configuration

Add Custom Objects to Page Layouts

You can add a custom object to your Oracle Sales Assistant for Microsoft Teams chatbot.

Sales objects are also known as features in Sales Assistant for Microsoft Teams. When you create a custom Sales object in Application Composer a corresponding feature is also created in Sales Assistant for Microsoft Teams. Custom features can be found in the Application Features pane in the Microsoft Teams Composer page.

Here's how you add a custom object, or feature to your Oracle Sales Assistant for Microsoft Teams using Microsoft Teams Composer.

1. Sign in to the Oracle CX Sales application as user with a Sales Administrator role.
2. Select the sandbox you want use for your configuration.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Select the **Sales** application and find the custom object you want to add to Oracle Sales Assistant for Microsoft Teams.
5. Expand the object's menu and click **Fields**.
6. Select the field you want to add to Oracle Sales Assistant for Microsoft Teams.
7. In the Constraints section, enable the **Include in Service Payload** option.
8. Click **Save and Close**.
9. Repeat steps 6 to 8 for each field that you want to add to the application.
10. Next, under the Common Setup Menu, click **Oracle Sales Assistant Setup**.
11. Click the **Microsoft Teams Composer** tab to open the Oracle Sales Assistant for Microsoft Teams configuration tool.

12. In the Features pane, click the **+ Add Feature** and search for the custom object you previously created in Application Composer.
13. Click the custom object (otherwise known as a feature) that you want to add.
14. Choose an icon from the list to display for the selected custom feature.
15. Click **Next** and a preview of the List and Summary views that will be created are displayed for the selected custom feature.
16. Click **Ok** and add the custom object to the Features pane.
17. If you want to add custom layouts to the List or Summary views, see the Create Your Own Page Layout for a Feature Using Microsoft Teams Composer topic for more details.
18. When you have finished adding the custom feature, click **Save** in the top right-hand side of the Microsoft Teams Composer page.
19. Next, use the Common Configuration tool to define the synonyms for the newly enabled custom object. See the Common Configurations section for more details.
20. Test and publish your new features. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your changes.

Test Your Oracle Sales Assistant for Microsoft Teams Configuration

After you have configured Oracle Sales Assistant for Microsoft Teams using Microsoft Teams Composer, you should test your configuration before distributing the changes to your users.

Task Summary

To test your configurations, complete these tasks:

1. Download the configuration changes from the sandbox and verify them.
2. Publish the sandbox.

Download Configuration Changes From the Sandbox

Here's how:

1. After making changes to your configuration, keep the Oracle CX Sales application open (signed in with a Sales Administrator or Sales Implementor role). Make sure that the sandbox where you made the changes is active in the application.
2. Sign in as a Oracle Sales Assistant for Microsoft Teams user that will be able to view your configuration changes. For example, if the changes have been made to a layout with an assigned role, then you'll need to sign in as a user with the required role permissions to view the changes.
3. Check your configurations by sending "refresh metadata". Then send the utterance to get the record for the layout.

Publish the Sandbox

Once you're ok with your configurations, publish the sandbox. Here's how:

1. Sign in to Oracle CX Sales as the same user you used to make the configuration changes.
2. Publish your sandbox to distribute your changes to all Oracle Sales Assistant for Microsoft Teams users.
3. Send "refresh metadata" one more time so all users receive the changes you made to your configurations.

Note: You can configure only the latest skill from the skill store that matches your current release. For example, if the skill you want to modify is from a previous release and you're making your changes in a later release, then you must re-base the skill your users are using to the latest skill that was modified. In addition, you must re-route the channel to the new re-based skill so that users can start using it and perform Reset sessions in the channel UI.

Configure Microsoft Teams with Custom Scripts

You can configure Microsoft Teams to match your business requirements by writing custom scripts using JavaScript that enforce validations and rules.

You can create scripts for Microsoft Teams using the CX Sales Mobile script tools. You can also assign scripts for CX Sales Mobile to Microsoft Teams if the requirements for both channels are the same. You can add custom scripts for Microsoft Teams to Appointments, Call Reports, and Tasks for On Create, Before Save, and After Save events.

Note: To enable the custom scripts for Microsoft Teams feature, you must first create an Enable Custom Scripts for Microsoft Teams (CDA_ENABLE_CSS_TEAMS) profile option, and then set the option value to Yes. For more information, see *Enable Custom Scripts for Microsoft Teams Profile Option*.

Create a Script and Assign to Microsoft Teams

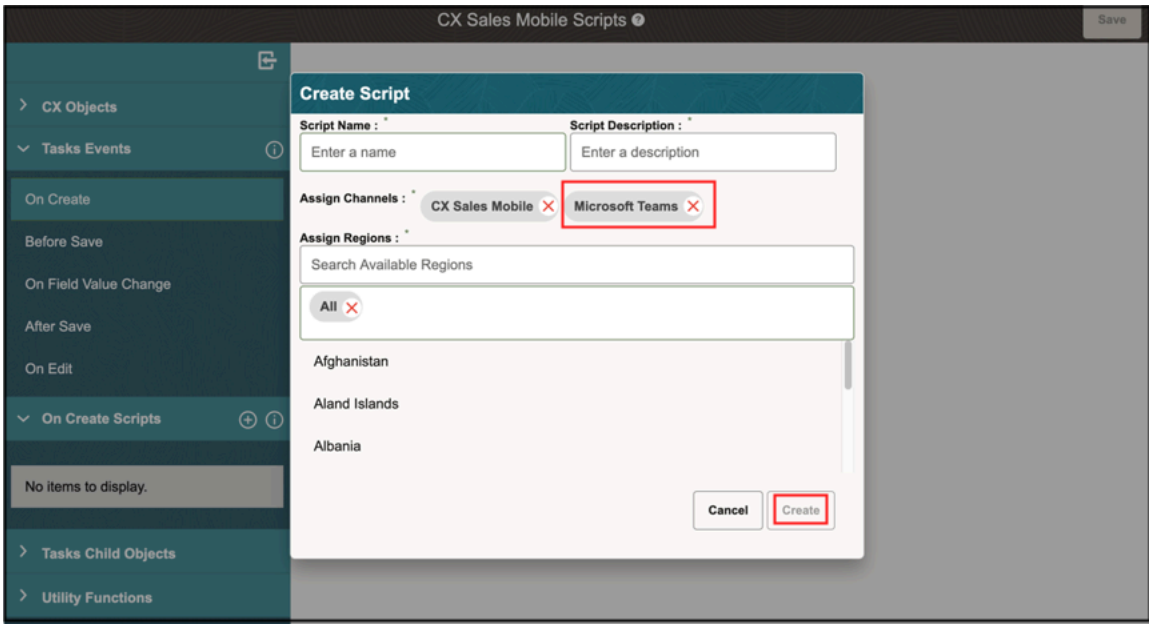
Here's how you create a script and assign to Microsoft Teams:

1. Select the sandbox you want use for your configuration.
2. Select **Navigator** > **Application Composer** > **Mobile Application Setup**.
3. Click the **CX Sales Mobile Scripts** tab at the top of the **Mobile Application Setup** page.
4. To create a script for a top-level parent object, select the object you want to write a script for, and then select the event that will trigger your script. You can choose one of these events:
    - On Create (triggered when a new record is created in the mobile app).
    - Before Save (triggered before a record is saved).
    - After Save (triggered after the app has saved the record).
5. Click the plus icon in the **<Event Name> Scripts** section.
6. Enter the script name and description.
7. (Optional) If you want the script to work for particular regions, select geographical regions for the script. The script will work for users who have your selected regions as their country preference setting in the CX Sales app.

    Note: A script can have multiple regions associated to it, but the same region can't be assigned to more than one active script for the same object and event.

    If you want to restrict your script to trigger for certain user roles, you will need to specify these by writing a JavaScript script

8. Select **Microsoft Teams** as your assigned channel and click **Create** to create your script.



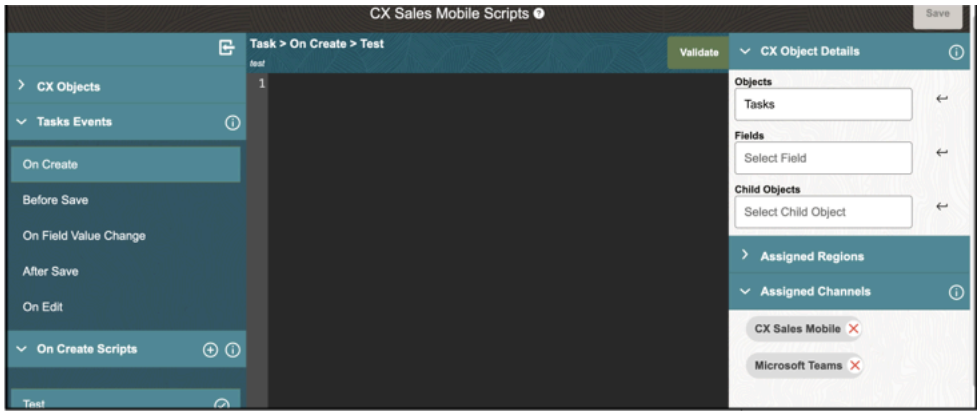
9. Click **Validate** to check whether your script has any errors. The validation checks include checks for nested functional calls and anything else in the script that will cause it to run forever in an infinite loop.
10. When you're finished, click **Save**.

Assign Existing Scripts to Microsoft Teams

You can also assign existing scripts for CX Sales Mobile to Microsoft Teams if the requirements for both channels are the same.

Here's how you add an existing script and assign to Microsoft Teams.

1. Select the sandbox you want use for your configuration.
2. Select **Navigator** > **Application Composer** > **Mobile Application Setup**.
3. Click the **CX Sales Mobile Scripts** tab at the top of the **Mobile Application Setup** page.
4. Choose the event and locate the existing script that you want to assign to Microsoft Teams.
5. Select **Microsoft Teams** as your assigned channel.



6. Click **Validate** to check whether your script has any errors. The validation checks include checks for nested functional calls and anything else in the script that will cause it to run forever in an infinite loop.
7. When you're finished, click **Save**.

Enable Custom Scripts for Microsoft Teams Profile Option

You can add custom scripts for Microsoft Teams to Appointments, Call Reports, and Tasks for On Create, Before Save, and After Save events. For example, you can trigger a script to validate or enforce some rules before or after a call report is saved.

To enable the custom scripts for Microsoft Teams feature, you must first create an Enable Custom Scripts for Microsoft Teams (CDA_ENABLE_CSS_TEAMS) profile option, and then set the option value to Yes.

Here's how to edit the CDA_ENABLE_CSS_TEAMS profile option:

1. Sign in as a user with access to the setup areas.
2. Navigate to **Setup and Maintenance** work area.
3. Open the Tasks side panel and click **Search**.
4. Search and select the Manage Profile Options task.
5. From the Manage Profile Options page, click **Actions** > **New** .
6. Enter all the fields with relevant details with specific attention to the following:
    - Profile Option Code = CDA_ENABLE_CSS_TEAMS
    - Profile Option Name = Enable Custom Scripts for Microsoft Teams
    - Application = Sales Assistant
    - Module = Sales Assistant (Module Type = LBA)
    - Start Date = Date that the option should start to be enabled
7. Click **Save and Close**.
8. For the Site Profile Option Levels, select the Enabled and Updatable check boxes to enable.
9. Click **Save and Close**.
10. In the Setup and Maintenance work area, open the Manage Administrator Profile Values task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
11. In the Manage Administrator Profile Values page, search by the profile option code, CDA_ENABLE_CSS_TEAMS.
12. Click the profile option name link.
13. On the Profile Values section, click **Actions** > **New** .
14. Select Profile Level to Site and set Profile Value = Y.
15. Click **Save and Close**.

FAQs for Microsoft Teams

How can I hide or display a feature?

Navigate to the Microsoft Teams Composer in Application Composer. In the Application Feature pane, select the feature you want to hide or display, and click the Enable icon to enable or disable the feature in the Feature Details pane. Click Save.

Can I configure additional fields to prompt during a conversational create?

Yes, you can specify what fields you want the assistant to prompt in both the edit page layout sections for CX Sales Mobile and Microsoft Teams.

By default, when you create an object, the assistant only prompts for values of fields on the edit page layout that are required and have no defaults values.

However, if you would like the assistant to prompt for additional fields that aren't mandatory, or mandatory and have a default, then you can select the fields in the **Prompted Fields on Assistant Create** section on the left hand side of the Microsoft Teams and CX Sales Mobile configuration tools. Any fields selected in this section will always be prompted during conversational create if the field is part of the edit layout. The fields selected in this section also applies to the predefined standard or custom layouts.

For CX Sales Mobile, see *Configure the Edit Page Layout* for more information. For Microsoft Team, click the related link *About Page Layouts for Standard and Custom Objects*.

Related Topics

- About Page Layouts for Standard and Custom Objects
- Configure the Edit Page Layout

CX Sales Mobile

Set Up Oracle Sales Assistant for CX Sales Mobile

Oracle CX Sales Mobile is a specialized mobile application for CX Sales. Only the CX Sales skill (Oracle Sales Assistant) for CX Sales can be set up with CX Sales Mobile.

You create a channel in Oracle Digital Assistant and expose your Sales Assistant in Oracle CX Sales Mobile.

Set Up CX Sales Mobile

Once you have performed the steps to configure ODA and have access to start using Sales Assistant, you can configure the Oracle Web Channel to associate to the Sales assistant skill. Here's a table summarizing what you must do to set up CX Sales Mobile with the Oracle Sales Assistant. See the topic referenced in the last column for details about each setup step.

Step	Task	Description	Where to get more details
1	Complete the prerequisite Oracle Digital Assistant application setup.	Before you set up any of the features that use natural-language processing, you must perform some prerequisite setup of Oracle Digital Assistant:	See the topic: *Overview of Common ODA Setup for Sales*. For additional information, see the Oracle Digital Assistant documentation: *Getting Started*

Step	Task	Description	Where to get more details
		• Set up administrator users • Obtain the ODA URL • Enable the Digital Assistant used for Oracle Fusion Cloud Applications If you already completed the setup for another feature, you can skip this step.	*with Oracle Digital Assistant for Cloud Applications.*
2	Create a Channel in Digital Assistant.	Create an Oracle Web Channel in Oracle Digital Assistant.	See the section "Create a Channel in Digital Assistant" in the topic *Enable Sales Assistant for CX Sales Mobile* for more information.
3	Set up in CX Sales Mobile Composer tab in CX Sales Application Composer.	To enable Oracle Sales Assistant in CX Sales Mobile, enter the **Oracle Digital Assistant Host** and **Channel ID** of the Oracle Web channel registered in Oracle Digital Assistant.	See the section "Set the Digital Assistant Host and Channel ID" in the topic *Enable Sales Assistant for CX Sales Mobile* for more information.
4	Enable or Disable Sales Assistant for Standard or Custom Objects.	In the CX Sales Mobile configuration tool, select the standard or custom objects you would like to enable for sales assistant.	See the section "Enable or Disable Sales Assistant for Standard or Custom Objects" in the topic *Enable Sales Assistant for CX Sales Mobile* for more information.
5	Test Your Configurations.	After you have configured Oracle CX Sales Mobile using Application Composer, you should test your configurations before distributing them to your user's mobile devices.	See the topic *Test Your Configurations* of the Mobile Applications chapter of this guide.

Note: The CX Sales Mobile app uses saved searches and other work areas that are powered by the high-performance search capabilities of Adaptive Search. Prior to using the CX Sales Mobile application, check that Adaptive Search is deployed in the CX Sales application, and that search indexing processes are run and regularly scheduled. You must also ensure that these fields are enabled for use as search filters for the following objects:

- Opportunity: - Status, Sales Method
- Activity: - Type, Activity, Start Date, End Date, Status, and Due Date

Enable Sales Assistant for CX Sales Mobile

Sales assistant is an individual chatbot that you can use to help you perform your daily sales-related tasks. Using your phone, you can ask questions or commands to the sales assistant and it retrieves the information, or acts on your requests. It reduces manual data entry, and makes it easier to view and update sales records through text or voice commands.

Follow the steps outlined in the following sections to enable sales assistant for your sales representatives.

Create a Channel in Oracle Digital Assistant

1. In a browser window, open ODA, click **Channels** in the left menu, and choose **Users**.
2. Click **+ Channel** to open the Create Channel dialog.
3. Give your channel a name.
4. Choose **Oracle Web** as the channel type.
5. Disable the **Client Authentication Enable** option using the toggle.
6. Enter an asterisk (*) for **Allowed Domains**.
7. Set the Session expiration time.
8. Click **Create**.
9. In the Channels page, copy the Channel ID and make a note of it.
10. Click **Route To** and select the Sales skill that you want to associate with the channel.
11. Switch on the Channel Enabled control.

Set the Digital Assistant Host and Channel ID

After you create the Oracle Web channel in Oracle Digital Assistant, configure Oracle Fusion Cloud Applications with the values from the web channel. You don't need to create and publish a sandbox to configure channels for your sales assistant.

Here's how to set the Digital Assistant host and channel ID to enable Oracle Sales Assistant in CX Sales Mobile.

1. Select Application Composer under the Configuration category in the Navigator menu.
2. Under the Common Setup Menu, click **Productivity Applications Configuration**.
3. Click the **Oracle Sales Assistant** tab to open the Channels Configurations page.
4. Navigate to the **Register the Oracle Digital Assistant Channels** section of the Channels Configurations page.
5. Enter the following host and channel ID details:
    - In **Oracle Digital Assistant Host**, enter the Oracle Digital Assistant Instance URL without https://
      See the topic: *Obtain the Oracle Digital Assistant URL*
    - In **Channel ID**, enter the ID of the Oracle Web channel that you created in Oracle Digital Assistant.

Note: You can now begin to enable, configure, and test the sales assistant for CX Sales Mobile by using the Mobile Application Setup tool as outlined in the following sections. You must perform these tasks only from a new sandbox.

Enable Sales Assistant in the Mobile Application

Here's how to enable sales assistant for CX Sales Mobile in the **Mobile Application Setup** tool.

1. Sign in to the Oracle CX Sales application as a user with a Sales Administrator role.
2. Create a new sandbox to use for your configurations.
3. Select **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click **Mobile Application Setup**.
5. Click the **CX Sales Mobile Composer** tab.
6. In the Application Features pane, click **Settings**.
7. In the mobile interface designer, click **Oracle Sales Assistant Settings**.
8. Enable sales assistant by using the **Enable** toggle.
9. Oracle Sales assistant is available for all roles and regions by default. If you would like to restrict access, you can specify the roles and regions that can use sales assistant in the **Assigned Roles** and **Assigned Regions** fields. Just click the relevant field and select the roles and regions to assign access.

10. The **Enable Attachments** is selected by default and allows you to ask to view or upload attachments to your record.

    The **Enable Notes** is also selected by default and allows you ask to view or add notes.

    > **Note:** If you don't have access to attachments or notes in Oracle Sales, you won't be able add attachments or notes and won't be able to get any notes via Oracle Sales Assistant.

11. Click **Save**.

Enable or Disable Sales Assistant for Standard or Custom Objects

Finally, you need to specify which objects can be used with sales assistant.

1. In the Applications Features pane, click **Home**.
2. In the mobile interface designer, click the standard or custom object you would like to enable for sales assistant and in the Feature Details pane, click the **Enable for Sales Assistant** toggle.

    > **Note:** Sales assistant isn't available for the following objects: Calls to Log, Products, and Partners. Creating call reports is supported, but searching for them isn't.

3. Click **Save**.

Test Your Configurations

Test and then publish your sales assistant configurations. See the *Test Your Configurations* topic for details about how to check your mobile configurations.

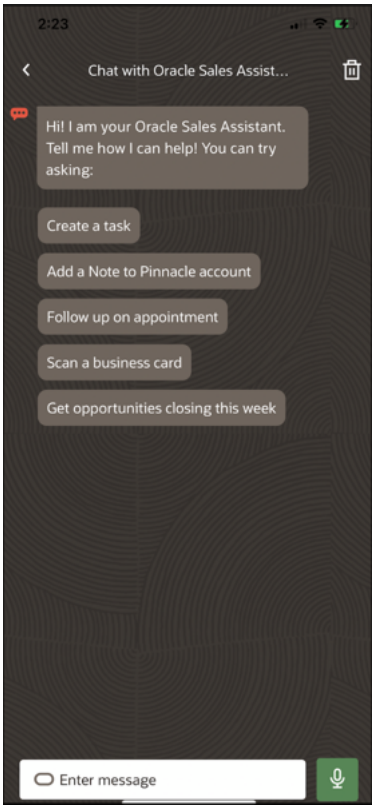
FAQs for CX Sales Mobile

Can I modify the Sales Assistant welcome message for CX Sales Mobile?

Yes, your administrator can now create a new or modify an existing welcome message with some suggestions of what sales representatives can do and say to the sales assistant which are relevant to your business.

Your administrator can modify the message in the Oracle Sales Assistant Common Configuration Tool within Application Composer.

For example, here's a sample sales assistant screenshot of a CX sales mobile welcome screen.



Related Topics

- Edit Strings in Oracle Sales Assistant Common Configuration Tool

Common Configurations

Overview of Managing Synonyms for Sales Assistant

A synonym is a word or phrase with a similar meaning for the CX objects and fields used in utterances sent to Oracle Sales Assistant.

Synonyms for CX objects and fields allow Oracle Sales Assistant to understand the objects and fields your user is asking about, based on your company's jargon. These can include abbreviations, slang terms, and common misspellings.

For example, your salespeople may call or refer to "opportunities" as "deals". The Oracle Sales Assistant Common Configurations administrator tool provides an easy way for you to manage synonyms for all supported channels without having to manually manage them in Oracle Digital Assistant.

Navigate to the Common Configuration Tool

Here's how to navigate to the Oracle Sales Assistant Common Configurations tool.

1. Sign in to the Sales application as a user with a Sales Administrator role.
2. Select or create a sandbox that you want to use for your configurations. Make sure that your sandbox includes Application Composer as an active tool.
3. Open Application Composer by selecting **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, click **Oracle Sales Assistant Setup**.
5. Click the **Common Configurations** tab to open the Oracle Sales Assistant Common Configurations tool.

When the Common Configurations tool opens, it first checks if there are skills compatible with current version of your sales application. Currently, Oracle only supports the same skill version as the latest sales application version. For example, if your sales application version is 21.04, then the skill version must also be 21.04. A message is displayed if there are no skills found with the same version.

If a skill version matches your sales application, then the Common Configurations tool displays both a left panel and a right panel. The right will be empty. The left panel consists of 1 main **Synonyms** section.

Use the Common Configuration Tool to Update Synonyms

To ensure that Sales Assistant is aware of any objects enabled from the CX Sales Mobile composer tool or Microsoft Teams composer, you can use the Oracle Sales Assistant Common Configurations administrator tool to update synonyms for the objects enabled.

Update Synonyms for Objects Enabled for Oracle Sales Assistant

Here's how to update synonyms for objects enabled for your Sales Assistant.

1. Sign in to the Sales application as a user with a Sales Administrator role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, click **Oracle Sales Assistant Setup**.
5. Click the **Common Configurations** tab to open the Oracle Sales Assistant Common Configurations tool.
6. Expand the **Synonyms** section and under the **CX Objects** section, select the object for which you want to update synonyms.
    - The objects displayed are objects are that enabled for Oracle Sales Assistant for any supported channels.
    - If you're looking for a child object, first select the parent object, such as "Opportunities", from CX Objects section. Then select the child object from the **Child Objects** section, such as "Opportunities Child Objects".
    - If the child object is also a top-level object, select the top-level object to define the synonyms required.
7. From the **Object Name Synonym(s)** field in the right pane, enter the synonym that you want for the selected object in the Enter Synonym(s) text box and press **Return**.
    - Once the synonym is added, it displays in the list of synonyms for the object.

    > **Note:** Predefined synonyms can't be removed. To remove a custom synonym, select it from the list and click the X icon.
8. Click **Save**. The Select Sales Assistant Skill dialog is displayed.

9. From the **Select Sales Assistant Skill** dialog, select the Sales Assistant skill that you want the updated synonyms for objects transferred to.
10. Click **Save**.

    An in progress notification is displayed during the transfer and a success message is displayed when the transfer successfully completes. The next time you update and save synonyms for an object, the Select Sales Assistant Skill dialog displays the last updated Sales Assistant skill that you have saved to.

    > **CAUTION:** An error message displays if there is an problem during the transfer to the skill. Any updates you made won't be saved if you exit the Common Configurations administrator tool at this stage.

Update Synonyms for Fields Enabled for Oracle Sales Assistant

Use the Oracle Sales Assistant Common Configurations administrator tool to update synonyms for the fields to use in a conversation. You want to ensure that Sales Assistant is aware of the fields you want your users to use in a conversation with the assistant from any of supported channels, such as updating a synonym for a field used to search for a record.

Here's how to update synonyms for your Sales Assistant fields.

1. Sign in to the Oracle CX Sales application as a user with a Sales Administrator role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, click **Oracle Sales Assistant Setup**.
5. Click the **Common Configurations** tab to open the Oracle Sales Assistant Common Configurations tool.
6. Expand the **Synonyms** section and under the **CX Objects** section, select the object for the field which you want to update synonyms.
    - If you're looking for a field of a child object, first select the parent object, such as "Opportunities", from CX Objects section. Then select the child object from the **Child Objects** section, such as "Opportunities Child Objects".
7. Once the object is selected, select a field from the **Fields** section in the right pane, enter the synonym that you want for the selected field in the Enter Synonym(s) text box and press **Return**.
    - Once the synonym is added, it displays in the list of synonyms for the field.

      > **Note:** Predefined synonyms for fields can't be removed. To remove a custom synonym for a field, select it from the list and click the X icon.
8. Click **Save**. The Select Sales Assistant Skill dialog is displayed.
9. From the **Select Sales Assistant Skill** dialog, select the Sales Assistant skill that you want the updated synonyms for fields transferred to.
10. Click **Save**.

    An in progress notification is displayed during the transfer and a success message is displayed when the transfer successfully completes. The next time you update and save synonyms for a field, the Select Sales Assistant Skill dialog displays the last updated Sales Assistant skill that you have saved to.

    > **CAUTION:** An error message displays if there is an problem during the transfer to the skill. Any updates you made won't be saved if you exit the Common Configurations administrator tool at this stage.

Tips for Adding or Updating Synonyms for Objects and Fields

Here are some tips for adding or updating synonyms for objects or fields

- If there are no skills of the same version as your sales application, then you must navigate to your Oracle Digital Assistant environment to get the latest version of the Sales skill from the Skill Store (via FADigitialAssistant).
- Synonyms can't contain characters such as, : (colon) or , (apostrophe) and can't end with ? (question mark), " or ' (double or single quote mark), or . (period).
- Synonym values aren't case-sensitive. For example, USA and usa are considered as the same value.
- You can't add synonym(s) that are already present in an object or a field. An error message displays if you try to add a duplicate synonym to the list.
- You can't add synonym(s) if the synonym is part of a set of reserved words for the Oracle Sales Assistant. An error message displays if you try to add a synonym that contains a reserved word to the list.
- If you add a synonym to a formula field, then Oracle Sales Assistant won't be able to search on the field because formula fields aren't searchable.

Edit Strings in Oracle Sales Assistant Common Configuration Tool

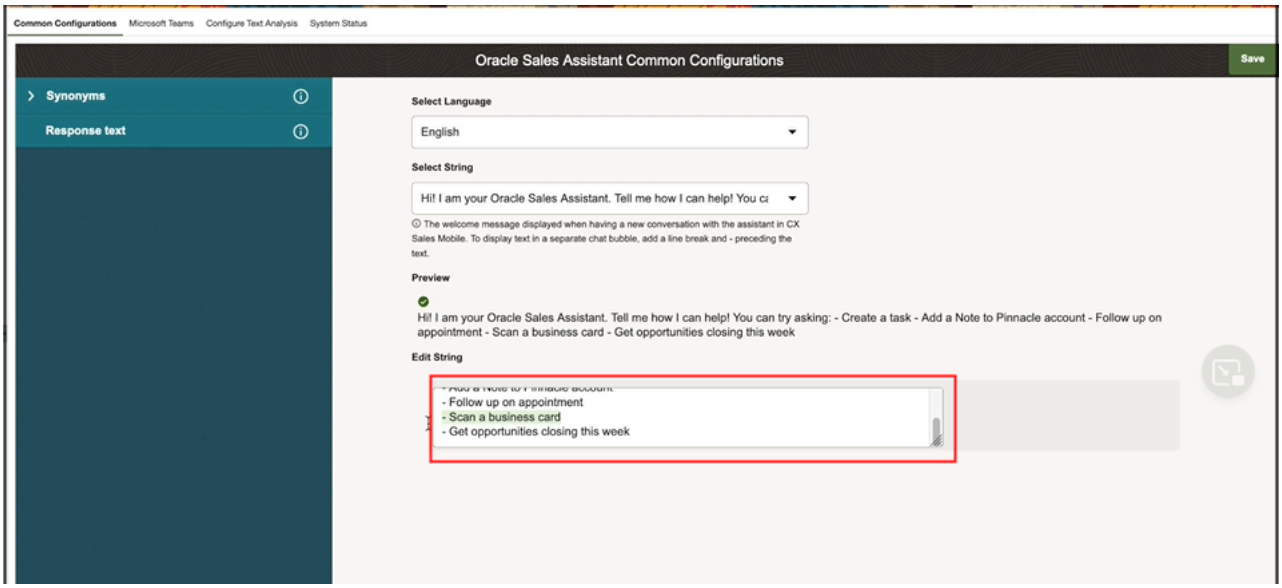
Use the Oracle Sales Assistant Common Configuration tool to update phrases or strings from the sales assistant. Responses from the sales assistant are based on such phrases or strings and applies to either CX Sales Mobile, Microsoft Teams, or users of both channels.

For example, you can modify the sales assistant help text to make the answer more relevant in response to a user's request for help on a contact list.

Follow these steps to update strings using the common configuration tool:

1. Create and enter a publishable sandbox where Application Composer is enabled.
2. Navigate to Application Composer.
3. Click **Oracle Sales Assistant Setup**.
4. Click the **Common Configurations** tab to open the Oracle Sales Assistant Common Configurations tool.
5. Click on the **Response Text** section.

6. In the **Select String** drop down list, search for the string you want to update. For example, search for "I am your Oracle sales Assistant" as shown in this sample screenshot to locate the CX Sales Mobile's sample welcome message.

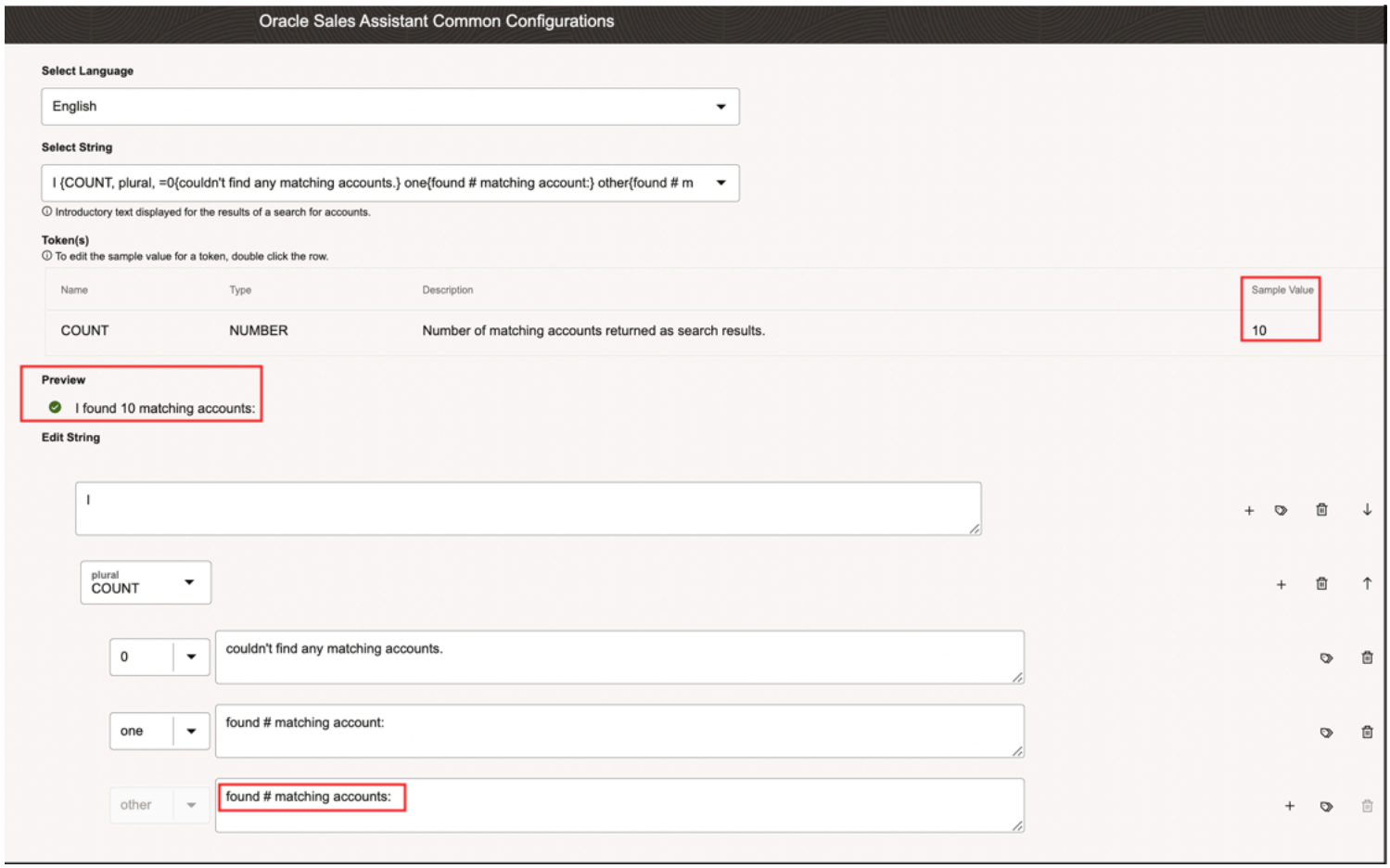


7. Select the string you want and make your changes in the **Edit String** field.

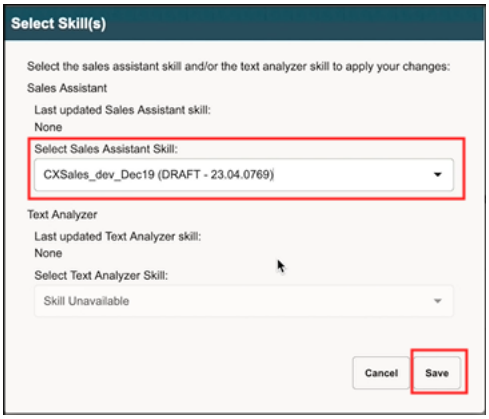
   Strings are in ICU format. Some strings contain tokens and some strings are pluralized. You can preview how the string will be rendered under the **Preview** section. For example, if your string contains tokens, for each token, double

click on the token row and enter the value in the **Sample Value** section. You can then preview the rendered string based on the sample value you enter.

Here's a sample screenshot that highlights where to enter and preview a sample token value from the Sales Assistant Common Configurations tool.



8. Click **Save**. The Select Sales Assistant Skill dialog is displayed.



9. From the Select Sales Assistant Skill dialog, select the Sales Assistant skill that you want the updated string to transfer to.
10. Click **Save**.

Related Topics

- Can I modify the Sales Assistant welcome message for CX Sales Mobile?

23 Web Activity Rules

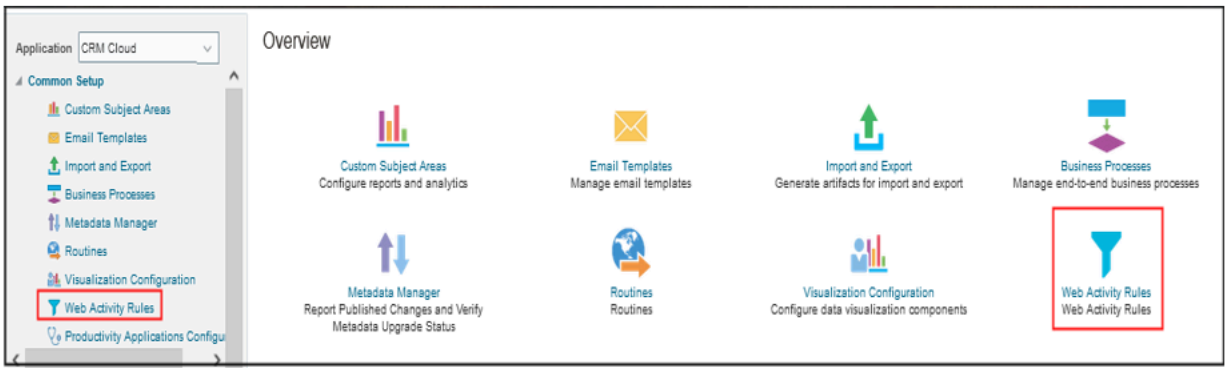
About Web Activity Rules

You can perform an activity sync from Oracle Eloqua to Oracle Sales contacts, leads and opportunities that exist in Sales. Use the Web Activity Rule expression builder to define rules to include or exclude web activity records for the objects that are of interest.

For example, you might want to create a web activity rule that imports only those emails that were sent from a campaign after a specific date and exclude any emails that have the term " Oracle" in the email subject.

Here's how to access web activity rules.

1. Open Application Composer by selecting **Configuration > Application Composer** in the Navigator menu.
2. Under the Common Setup Menu, click **Web Activity Rules** to open the Web Activity Rules UI.



You can create rules to import records for the following web activity types:

- Email Open
- Email Click-Through
- Email Send
- Form Submit
- Page View
- Web Visit

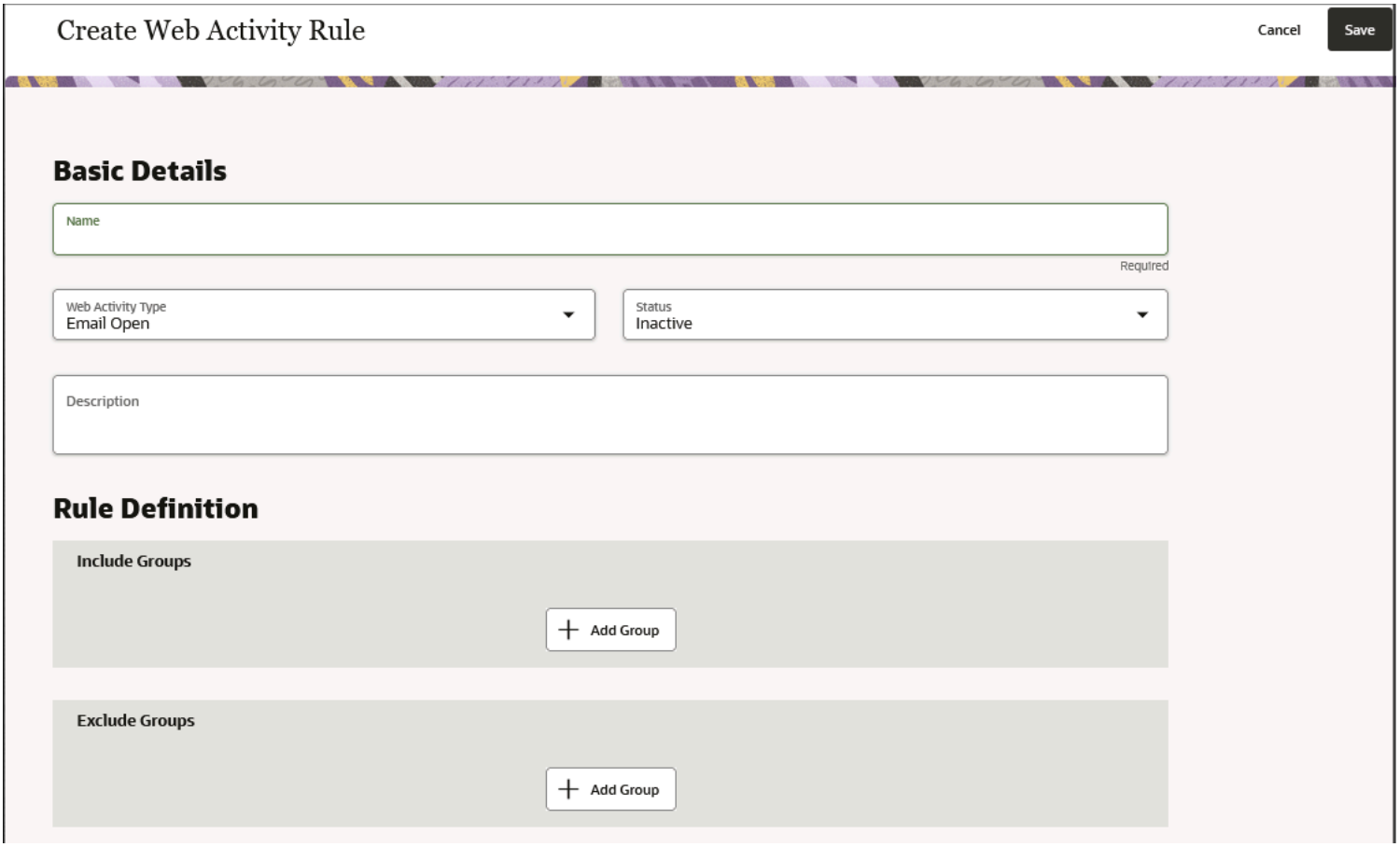
Any rules that you have already created are displayed in the Web Activity Rules list page. It shows the name of the rule as well as the type, status, creation and last updated dates and the name of the user who performed the last updates to the web activity rule.

Manage Web Activity Rules

From the Web Activity Rules page, you can view previously created rules, create, edit, and delete a rule to either include or exclude all or any attributes for the Campaign and Web Activity objects.

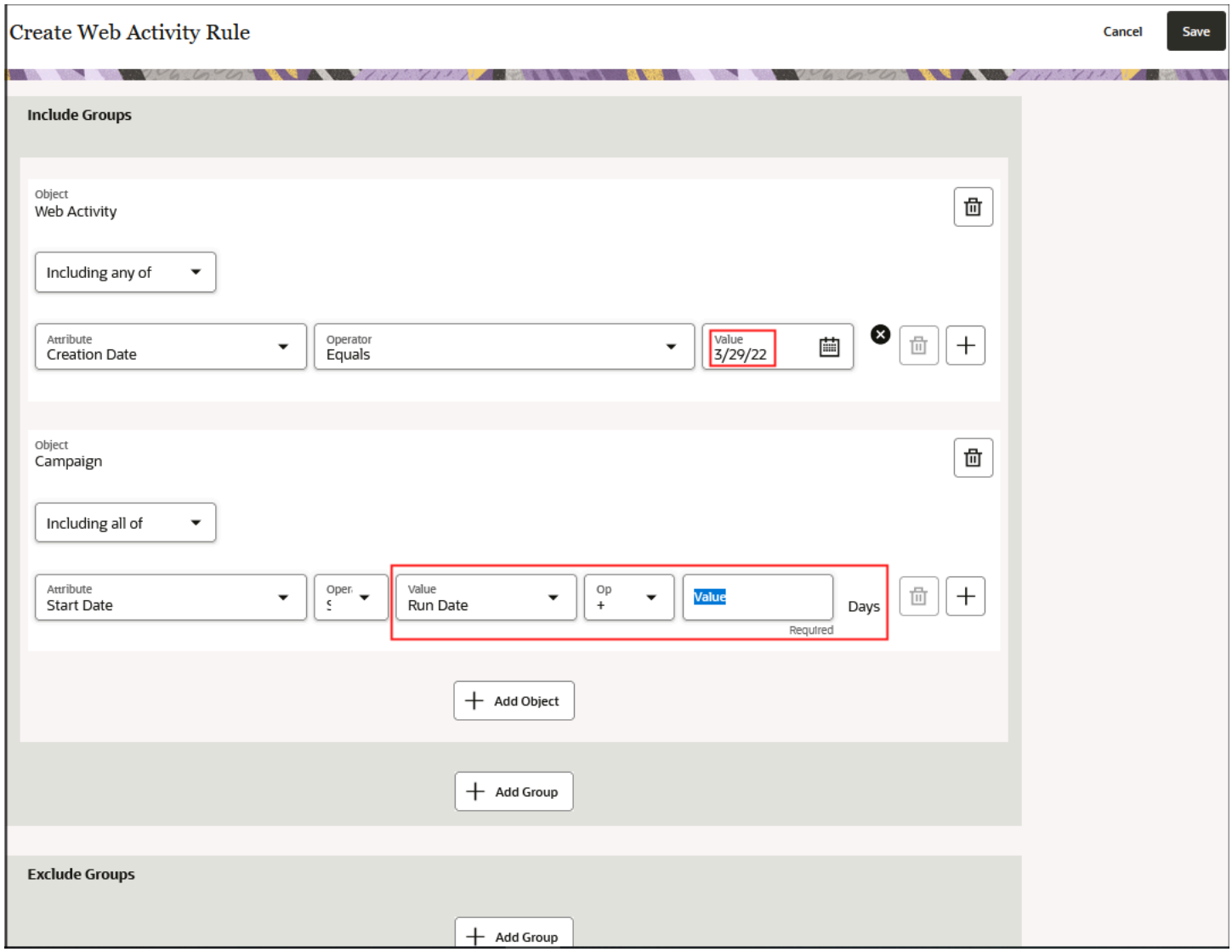
Here's how to create, edit, and delete a web activity rule.

1. Sign in as a sales administrators or user with the appropriate access privileges.
2. From **Application Composer** > **Web Activity Rules**, navigate to the Web Activity Rules page and click **Create**.



3. In the **Basic Details** section, enter the name and a brief description of the rule and the type of web activity to want to define the rule.
4. In the **Rule Definition** section, click **Add Group** to include or exclude groups of attributes for your selected object that you want to define for your web activity.

5. Click **Add Object** to select either the Campaign and Web Activity objects. Select the attributes, operators, and values that you want to define for the conditions of your rules.



You can define multiple rules for each of your objects. Click the plus (+) sign at the end of each row to add another rule associated with your web activity type.

> **Note:** For date values, you can select the specific date that you want or you can specify a run date plus or minus a specific number of days in integer format. For example, for date-related attributes you specify a run date plus 7 days. This means that if all or any of the rules are met, the rule will continue to process and update records 7 days past the specified run date.

6. When you're done with including and excluding group for the objects you want and have defined all the rule conditions, you can activate the rule by changing the **Status** field in the Basic Details section from Inactive to **Active**.
   You can only set 1 rule to Active for each web activity type.
7. Click **Save**.

Change Web Activity Rules

1. From **Application Composer** > **Web Activity Rules**, navigate to the Web Activity Rules page.
2. In the **Name** field, double-click the rule you want to edit. Note that you can change the basic details expect for the name of the rule and you can change all or any of the rule conditions.
3. Click **Save** to update the web activity rule name with your changes.
4. To delete rules that no longer apply, select them from the list page and click **Delete**.