Oracle Fusion Cloud Sales Automation

Using Sales for Redwood

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F77866-18

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Get Help

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

Get Help in the Applications

Some application pages have help icons ⑦ to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

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Thanks for helping us improve our user assistance!

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1 About This Guide

Audience and Scope

This guide provides an introduction to Oracle Sales for Redwood application. It explains the principles of using the interface and provides instructions on basic tasks.

Related Guides

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

Title	Description
Oracle Fusion Cloud Applications: Using Common Features	Describes user tasks and features that are common across Oracle Applications Cloud.
Oracle Fusion Cloud Sales Automation: Using Classic Sales	Describes the user tasks and concepts for Oracle Classic Sales.
How do I get started with Express Reports?	Explains how to use the Express Reports feature to create charts for your sales dashboard.

2 The Basics

Home Page

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

- After you sign in, make sure you're on the **Redwood Sales** tab to use Sales for Redwood features. The Sales tab, if it's available to you, includes many of the same icons, but they open the Classic Sales UI.

- Open the different business objects and work areas by clicking the navigation icons. Which navigation icons are available depends on your role and how your administrator has set up your application. Here's a sample list:

  - **Accounts**
  - **Contacts**
  - **Activities**

    Tasks and appointments
  - **Leads**
  - **Opportunities**
  - **Sales Dashboard**

    Overview of upcoming tasks, appointments, the pipeline, and other items requiring your attention. A good place to start your day.
  - **Sales Performance**

    The work area for contests and goals.
- The **Navigator** (the hamburger menu) provides an alternative way of getting to the same Sales for Redwood objects and work areas as the navigation icons. The Navigator includes many selections that aren't relevant to your application, so you may as well stick to the icons.

- Except for the **Home** and **Notifications** buttons, the other icons at the top of the page aren't used for Sales for Redwood or other Redwood UX applications.

- To sign out of the application, click your initials at the top right-hand side of the page and select **Sign Out** from the **Settings and Actions** menu.

Here's a screenshot of the Redwood Sales tab on the home page showing some of the main features:
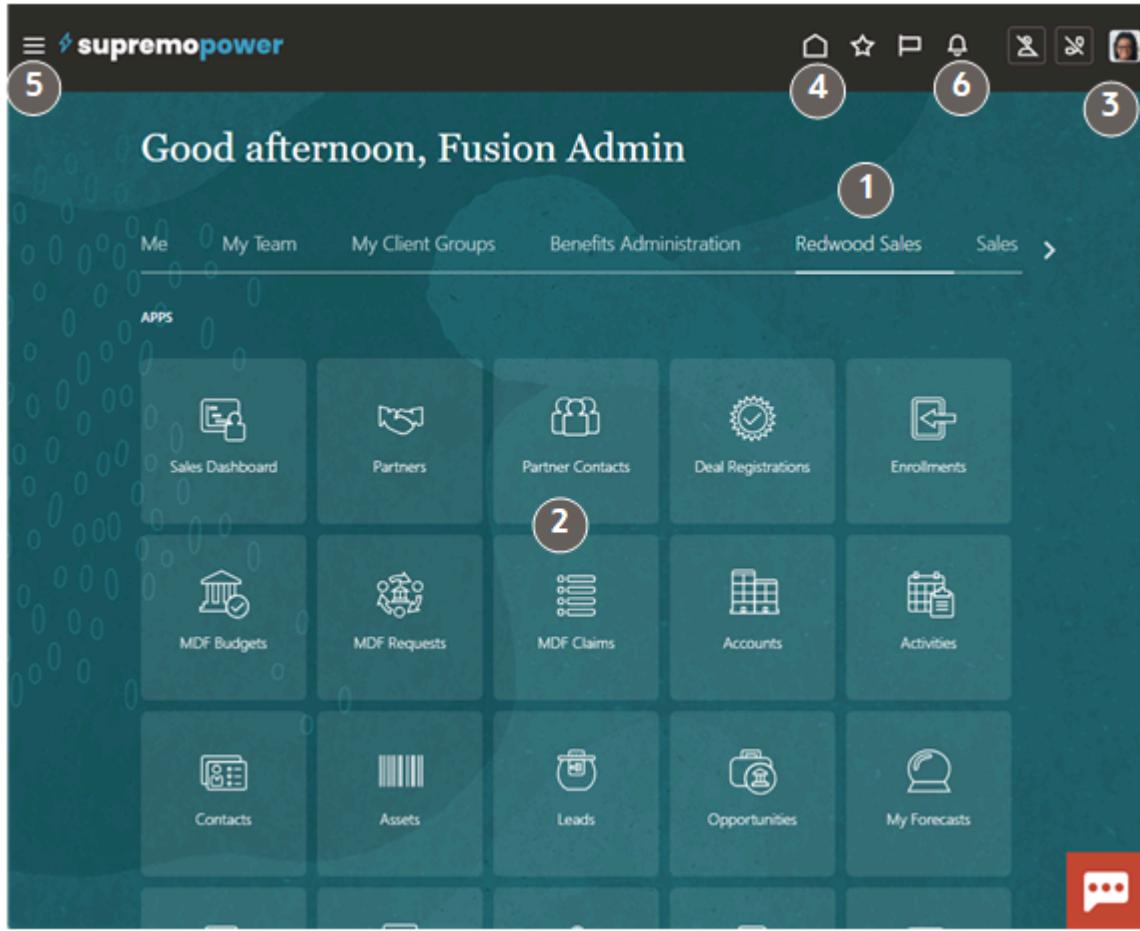
Home Page Anatomy

Callout	Description
1	Redwood Sales tab with navigation to features available in the Sales for Redwood. You can access Classic Sales features on the Sales tab.
2	Navigation icons.
3	Setting and Actions menu where you can sign out and access setup features depending on your permissions.
4	The Home icon, available on all pages, returns you here.
5	Navigator "hamburger" menu that you can use to open a full range of the Oracle Fusion Applications functionality that you have permission to access.
6	Notifications. Click the link in the notification to edit. For example, click the link on the name of a task you're notified about to edit the task.

Quick Tips to Get Started

This topic covers some basics to get started with Oracle Sales for Redwood.

Where to Start

- Click the Redwood Sales tab at the top of the Home page to view the different Sales work areas available to you.

- The Sales Dashboard is a good place to start your day. It shows you what's important for you to work on. You can open key work items directly from the dashboard and perform global searches. But don't forget to click **Notifications** (the bell icon) to see incoming customer communications and reminders. Notifications aren't included in the Sales Dashboard.

  You can bookmark the Sales Dashboard, so you don't have to navigate to it the next time you sign in.

Search and Take Action in the Ask Oracle Bar

The Ask Oracle bar is where you search and take action. Its functionality varies depending on where it appears:

- **In the Sales Dashboard**: The bar functions as a global search tool. You can search across all sales objects, including opportunities, leads, accounts, assets, and tasks. From the sales dashboard bar, you can also create tasks, contacts, opportunities, leads, and other records.

- **On the landing (list) pages**: The search is more targeted, lets you explore and track your customers, leads, and opportunities. You can filter and group records, view revenue by group, and create saved searches for quick access to information that matters to you. Search by keywords in record names or related details, such as the associated account name or account location. You can also take action on multiple items directly from the search results.

- **In lists of items related to a record (called subviews)**: Filter and search by keyword. For example, you can filter out all of the email communications with a customer in the list of activities for an account.

Navigation

- Use the navigation bar at the bottom of the page to open other work areas:
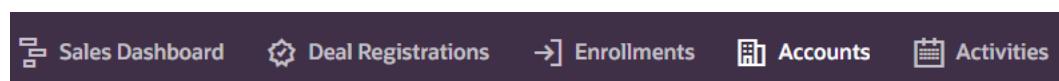
- In a record, scroll to see hidden panels. Swipe on a touch screen, use the mouse wheel, or use the **Tab** key.

- Bookmark important records so you can come back to them later.

- Use the back button on your browser to go back.

- Open multiple records on different tabs.

- Open related objects in a separate tab by right-clicking and selecting **Open in New Tab**.

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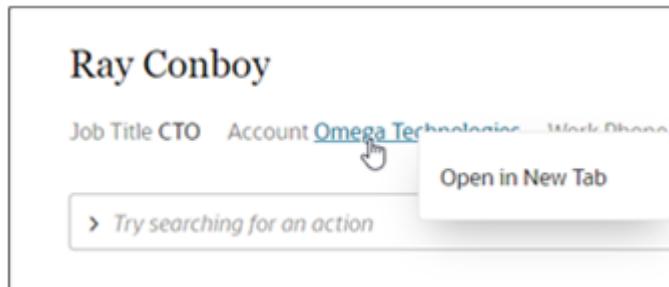
Work with Your Records

- When you're viewing records, you see what's important at a glance. You won't see complex pages with empty fields, buttons, and options. We've eliminated all the clutter.

- Take actions and update information using the **Ask Oracle** bar. Enter **update** and select what you want to update. Want to add a contact to the opportunity? Enter **Add** and select **Add Contact**. If you don't remember what actions are available, just start typing and see what the Ask Oracle bar suggests.

- The Activities page of each record displays past and future tasks and appointments, as well as notes, emails, calls, and important updates to the record.

- Use the Ask Oracle bar to filter activities, and follow up on email conversations with customers. You can also use the Ask Oracle bar to search the text of notes, tasks, and emails in Activities using single keywords.

Landing (List) Pages

When you click a sales object on the home page, the application automatically runs the default saved search for that object and displays the results as a list on the landing page.

Here's a landing page for leads, highlighting page controls that are common to list views for all objects.

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Callout Number	Description	What You Can Do
1	The name of the saved search that's displaying the list you're seeing on the page.	You can select a different saved search using the Ask Oracle bar.
2	Ask Oracle bar. The Record Set filter specifies the set of records that you can search. For example, My Open Leads displays all the unqualified leads you own. The list of filter criteria builds as you add filters and search terms. If there are no filters, you're seeing a list of all of the records that you have permission to view.	• Switch to a different saved search • Search by keyword • Remove and add filter criteria • Create records
3	Add filters	Search for and add filters
4	Group by	Select an attribute to group the information in your list. For example, selecting Status for a lead, breaks down your lead search results by status.
5	Number of records in your search results	You always know how many records match your search terms.

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Callout Number	Description	What You Can Do
6	Select to act on multiple items	Just select multiple items to see which actions area available. For example, selecting three unqualified leads, lets you qualify them all at the same time.
7	Take actions on individual items in your search results.	Click an item in the list to display the actions. For example, on the contacts landing page, click **Call** to call the primary number for a contact. Click **Send Email** to send an email to the primary email address and so on.
8	Configure the search result display.	Here you can choose which columns appear in search results, for example.

Sales Dashboard

Use the Sales Dashboard to search through all of your sales information, review sales trends, and stay informed on the key details for your day. The details can include pipeline, upcoming appointments, and overdue tasks. What information you see depends on your role in the sales organization and your data permissions. Sales administrators can create different sales dashboards for different roles.

Here's a screenshot of a sales dashboard annotated to highlight key features:

Callout	Feature	Feature Description
1	Ask Oracle bar	Use the Ask Oracle bar to: • Search across the whole range of sales information you can access (global search). • Create records by entering **create**. You can create contacts, tasks, opportunities and other records. • Create visualizations on the spot by entering a query, such as **show closed opportunities by sales stage**.
2	Dashboard filters	Filter the content of the selected sales dashboard tab. These filters filter the dashboard contents only. They don't affect your global keyword search.
3	Dashboard tabs	Sales dashboard is made up of tabs. A tab may include summary key performance information at the top of the tab that's always visible.
4	Graphics and tables	The tab contents can display up to 5 interactive tables and charts from a variety of sources

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Callout	Feature	Feature Description
		including Express Reports, Saved Searches, Oracle BI analytics.
5	Edit Page Layout button	If you see the button, then you can edit the sales dashboard and personalize the layout. You can even create your own reports using Express Reports or using the visualization AI agent. See the topic *View and Manage Express Reports*
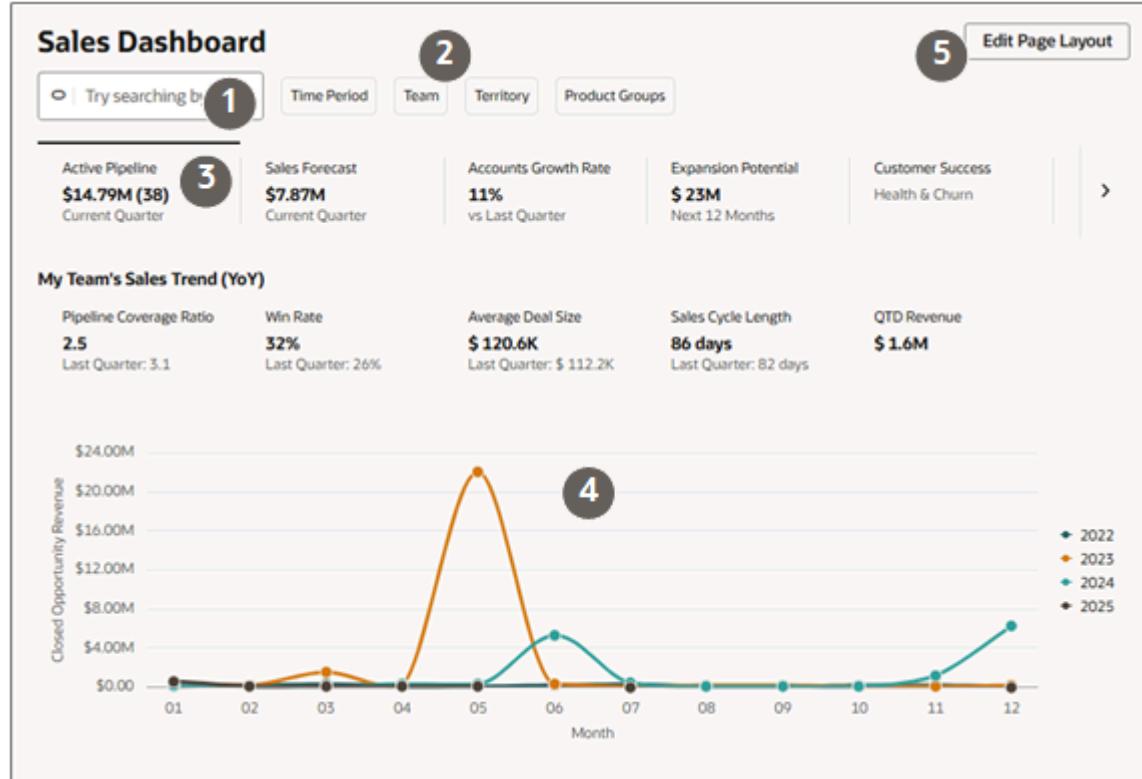
Notifications

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

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

1. Make sure you are in one of the Sales for Redwood work areas or pages.
2. Click **Notifications** (the bell icon).
3. In Notifications:

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- ○ Search for notifications by keyword.
- ○ Click the notification link to take you to the item you're being notified about. A missed call notification takes you to the activity stream for the contact that called, for example.
- ○ Click **Dismiss** to remove a notification from the list.

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

Records

Anatomy of a Record

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

Records Layout

Your records are divided into three sections:

- Summary (callout 1 in the screenshot)
- Ask Oracle bar (callout 2)
- Panels with key information (callout 3)

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Summary

The summary includes basic information about the account. What information you see is determined by the administrator.

The Ask Oracle Bar

The Ask Oracle bar in each record is the main way you update and interact with the record

- View information by entering `show` and making a selection.

- Update individual account fields and add information. Enter `update` or `add` to see what updates you can make.

- Open AI agents. For example, entering `Account`, displays AI agents that are available to you. These may include Account Advisor and Generate Account Description.

- Create related information by entering `create`. For an account, you can create contacts, opportunities, and leads.

- Email, call, assign ownership, and take other actions. The actions available depend on your permissions.

- Enter `filter` and select what information you want to see.

- Search activities by keyword. For example, enter `Tanaka` and select **Filter Tanaka**, to find all the appointments, tasks, notes, and communications where Tanaka is mentioned.

Panels with Key Information

Panels display a few items of key information.

Links on the panels open complete lists.

Which panels you see depends on the type of record and your sales administrator setup.

You may need to scroll to see all of the panels:

- Use the floating navigation bar on the panels.

- Swipe on a touch screen.

- Use the wheel of your mouse.

- Use the Tab key.

Enter `show` in the Ask Oracle bar to see a list of all information you can view.

Here's an annotated screenshot of a few of the important panels on an account record

Callout Number	What It Is	How You Use It
1	Activities panel	The activities panel displays both pending and the most recent activities. It displays up to five future and past activities.

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Callout Number	What It Is	How You Use It
2	View All Activities link	Click to display and edit activities. On the Activities page, you can view the full text of notes, reply to emails, reassign tasks, and so on.
3	Navigation bar	Navigate to other panels.

View All Activities

Click **View All Activities** on the **Activities** panel to view a list of pending and recent activities. Activities in the activity stream can include notes, emails, phone logs, and changes to key fields, for example. What you see is determined by your permissions and your application administrator.

- Filter the activities by entering **Filter** in the Ask Oracle bar and select the type of activity you want to view. For example, entering **Filter All Communications** , displays all emails, phone exchanges, and emails.

- Enter **show** to view different types of information. Here are some examples:

    - **Show Appointments** displays a list of past and future appointments.
    - **Show Addresses** for the account
    - **Show Phone Numbers** for the account
    - **Show Activity Summary** displays an AI-generated summary
  .

- Search for keywords in text or search for a particular person associated with an activity.

- Take actions on individual activities by clicking the `Actions` menu (the 3 horizontal dots).

- You can return to the record overview by clicking **Go to Overview** or you can use the browser back button.

Here's an annotated screenshot of an account Activities page:

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Callout Number	Description
1	Ask Oracle bar
2	Links to view more details.
3	Actions you can take

View All Contacts and Other View All Pages

The pages you reach by clicking the **View All** links let you see all of the information for the record and act on it. The Contacts page, for example, lets you filter the contacts, search for them. You can email a contact, make calls, and sort by any column.

Here's a screenshot the Contacts page for an account annotated with actions you can take.

Callout Number	What You Can Do
1	Search and filter by contact attributes in the Ask Oracle bar
2	Drill down into the contact record to edit it.
3	Call and email.
4	Make a contact primary or remove the contact from the account.

Details (Edit) Pages

You can edit some, but not all, basic details about a record by clicking the **Details** button at the top of the details page.

On the page you can use the field actions menus (the 3 dot icons highlighted in the screenshot) to broaden or narrow down your search. For example, if you don't see the correct company in the list of hits when making an entry in the Parent Company field, you can select a broader saved search from the menu. For more information, see the topic: *Search in Fields on Create and Edit (Details) Pages*

Ask Oracle Bar at the Top of the Record Overview

The Ask Oracle bar is a search box at the top of every record overview. It's key to working in Sales for Redwood.

Tips for Using the Ask Oracle Bar

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

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

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

Filter

Here are some of the filters that you can enter in the Ask Oracle bar to narrow down the list of activities in a record.

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

Get a List of Suggested Actions

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

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

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

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

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

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

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

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

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

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

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

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

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

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

- Entering **opportunity** lists two actions.

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

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Activities

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

> **Note:** The Activities work area you open from the home page lets you view and manage tasks and appointments only. To view a record of emails, calls, notes, and other updates to a record, you must view the Activities panel and page on the record itself.

Activities Panel

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

Activities Page

To view and edit all activities:

1. In the Activities panel click **View All Activities**.
2. In the Ask Oracle bar, enter **show** and select **Show Activities**.

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

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

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

Activities Page

Callout Number	Description
1	Ask Oracle bar to filter and search.
2	Pending and past activities, updates, and emails. The Pending section lists both pending and overdue tasks and future appointments. This section, which is closed by default, lists up to 20 items at a time.
3	Actions on tasks, appointments, and emails. For example, you can call a contact on a task by clicking **Call**. If there's only one contact associated with the task, the call dials directly. If multiple contacts are associated, you can choose which one to call. For emails, clicking **Send Email** opens an email compose window addressed to all the contacts associated with the record in the To field. Resources are copied (entered in the CC field). You can also log an email that was sent outside the application by selecting **Log an Email**.

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Pending Activities

- Pending activities can be both pending and overdue tasks as well as future appointments (appointments where the start time is later than the current time).

- The Activities panel on the record overview displays just one pending activity, the one that's due at the earliest time in the future.

- The Activities page displays up to a maximum of 20 most urgent pending activities in a Pending section that's collapsed by default.

- When a salesperson completes an item in the Pending section, the item is automatically moved to the history section and additional items are displayed, if any.

- Appointments and tasks that are due in the immediate future display at the top of the section.

- Overdue activities are displayed at the bottom of the section.

AI-Generated Summary of Activities

Salespeople can generate a summary of activities by entering **show activity summary** in the **Ask Oracle** bar.

An AI agent generates and displays the summary in a drawer. Field changes are excluded from the summary.

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History

- The history section includes records of completed tasks, appointments, and communications, including call logs, email chains, and web conferences. Also included are notes, web activities from marketing, and key record updates.

- Salespeople with the appropriate permissions can edit the call logs, activities, and notes.

- They can reply to emails (both Reply and Reply to All).

- The Activities panel on the record displays a maximum of 5 items.

- The Activities page displays 5 items at a time, the most recent first. You can scroll as far back as you want. Records are displayed for the past 3 years.

- Your administrator can configure which items and key updates are displayed in history.

Recommendations

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

- Analysis of the text in notes and call logs

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

- AI-Generated Recommended Actions for Opportunities

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

Eloqua Web Activities

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

- Form submits

- Web visits

- Email sends, opens, and clicks

Best Practice Guidance from Orchestrations

If your administrator has created best practices for handling the lead, account, or the opportunity you're working on, then you'll see a **Guidance** panel in the record overview. The panel displays any recommended steps as you work.

The recommendations automatically create either a task for you to accomplish or an appointment for you to schedule. You can also view the goals you're to accomplish using these tasks. Aside from the recommendations, the orchestration can also take automated actions behind the scenes as you work. For example, if you fail to reach someone by phone, the application can send a mail-merged follow-up email and remind you to call again in a few days.

Here's a screenshot of a Guidance panel and details for an opportunity.

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Callout Number	Description
1	The Guidance panel displays the current recommended step. You can act on the step directly from the panel.
2	Clicking the **View All Steps and Objectives** link displays a drawer listing the steps.
3	**Steps and Objectives** drawer displays the steps and related objectives.
4	The steps include those your team has completed, has skipped, and those that are still in progress.
5	You can act on a step, or mark it as completed or skipped.
6	The steps complete a set of objectives. You can view how far you've progressed in reaching the objectives on the **Objectives** tab.
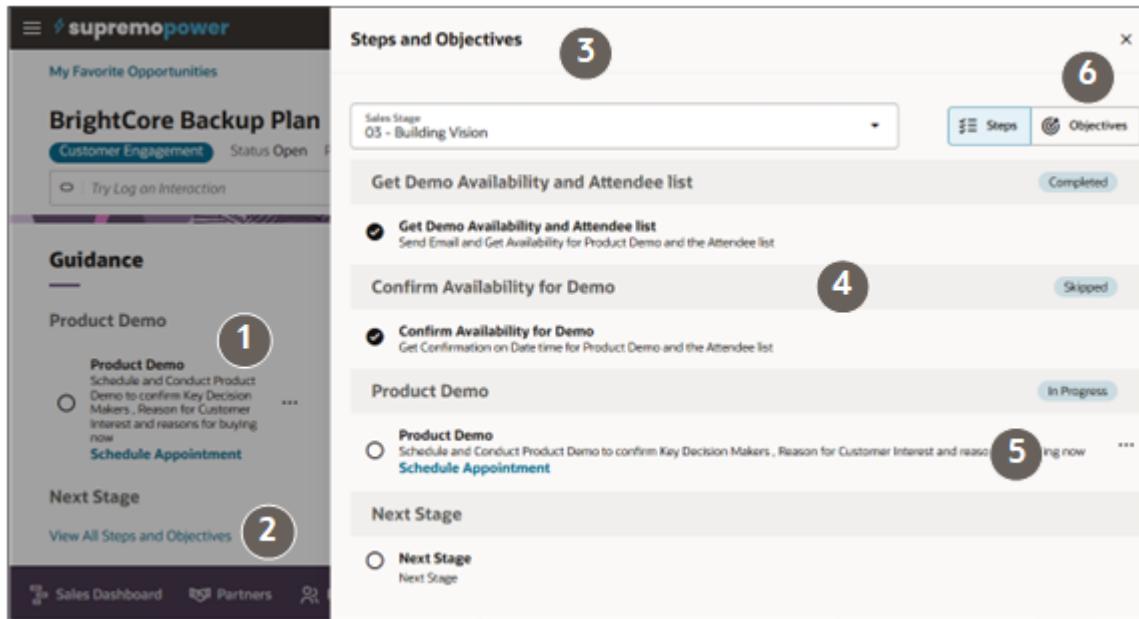
Search and Filter Activities and Record Updates

You can search and filter the activities for a specific record by opening the record and entering your filters and search terms in the Ask Oracle bar.

To filter, just enter the word **filter** in the Ask Oracle bar, and then select the filter. For example, you can select **Email Communications** to view and search all emails. Or select **Filter Field Changes** to view the tracked field updates and learn who made those changes.

You can enter multiple filters. Each filter expands the range of your search. For example, adding **Notes** to **Email Communications** shows both emails and notes.

Adding a keyword searches the notes and emails.

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

This screenshot shows the result of a search for the keyword **alliance** in email communications and notes.

Filter and Keyword Search Results Example

Callout	Description
1 and 2	The filters you enter specify which type of activities you want to search, in this example: Notes and Email Communication.
3	Keywords you entered appear in single parentheses.

Note: The listing of activities doesn't allow you to add multiple filters to restrict your search. However, you can use multiple filters and enter filter values for tasks and appointments in the subviews that display when you enter **Show Tasks** and **Show Appointments** in the Ask Oracle bar.

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

You can filter and search through the information on the Contacts, Accounts, Opportunities, and other the "All" pages in a record provided that the pages include the Ask Oracle bar. Which attributes you can filter and search on depends on the information type. If you added custom objects, you can filter on all of its attributes.

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1. In the Ask Oracle bar, enter **filter** and select a filter. For example, on the All Contacts Page, you can filter on Name, Primary Email, Comments, and Contact Job Title.

   Note: You can't filter on all of the common attributes, just on those listed. For example, you can't filter opportunities by sales stage. And you can't filter team resources by their role.

2. Select the operator.
3. Enter a search term in the **Value** field. You can enter only one keyword. Searches aren't case-sensitive, and no operators are permitted.
4. Click **Apply**.
5. You can add additional filters.

Here's a screenshot of the Contacts page for an account with the Name filter applied, and Contains operator selected. Nelson is the search term entered in the Value field.

Update Multiple Records at the Same Time in List Pages

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

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

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

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

3. Click **Submit**.

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Track Favorite Records

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

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

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

Display the Most Relevant Items to You

You can display the most relevant items on a landing page by adding the **Show Smart List** filter and setting that filter to **True**, or by selecting the **My List for <object>** list (the object changes depending on the list page).

Selecting the **My List for Accounts** or adding the **Show Smart List** filter to an account search, for example, displays a list of accounts ranked by the number of times you've opened each account, its contacts, and its opportunities, and how recently you opened these. So, if today, you view or update information related to Acme 4 times, but only open Pinnacle once, then Acme appears higher on the list than Pinnacle. Where an item appears on the list depends on a calculated score. The score is calculated using a number of factors:

- Recency: The last time you interacted with the record.

- Frequency: How often you interact with the record.

- Favorites: If you marked the record as a favorite.

- Urgency: When an action is expected from you. This could be 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.

Verify Phone Numbers and Email Addresses

Verify Phone and Email

When your sales organization subscribes to the Oracle Address, Email, and Phone Verification service, you know right away if you entered an invalid phone number or an invalid email address.

The application can't check if the phone numbers and emails you enter are valid for the specific person or account, of course, but it does assure that a phone number will actually dial and that an email won't bounce.

When a phone number or an email address is invalid for some reason, you get notified right under your entry. If nothing appears, the information is valid, and you're good to go.

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

- In the record overview at the top of the page, hover over the phone number or email address.

- In the details page, you see the invalid status right under your entry.

Here's a screenshot of a problem contact on the details page:
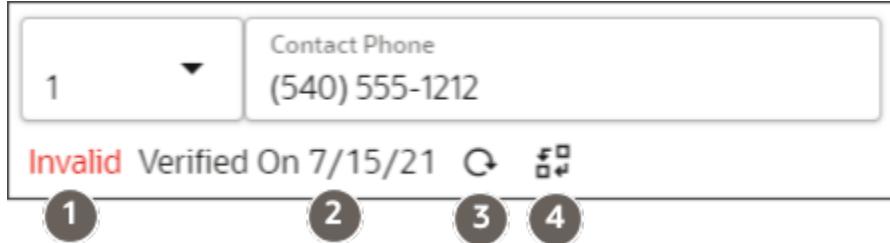
Callout Number	What You See
1	Status. For phone numbers, this can be only **Invalid**. Email addresses can also display the status of **Partially-Valid**: the domain is valid but the name isn't. If the person left the company or changed their name, then you'll see the Partially-Valid status.
2	Date the phone number was verified.
3	Reverify to verify again. You never know when area codes or names change. What's valid today may not be in 6 months.

Callout Number	What You See
4	Overwrite button to manually set the status. If you know that the number or email is correct, you can set the status to **Verified**. The application now displays the status **Overwritten on** instead of **Verified on**.

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

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

Overwrite an Invalid Contact Verification Status

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

Reverify a Phone Number or an Email Address

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

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3 **Search and Lists**

Search and Explore Your Sales Information on the Landing (List) Pages

The landing pages provide you with powerful search and filtering capabilities that let you find and explore your sales information.

1. Put your cursor in the Ask Oracle bar and select a saved search as your starting point.

   Most saved searches already include filters, which appear in the bar. For example, the My Accounts saved search restricts the search to accounts where you're in the team or territory.
2. Enter filters and keywords:

   o Filter results on a specific field. For example, to filter all the accounts in Boston:

      i. Enter `city`.
      ii. Select **Primary Address: City** to specify the address type.
      iii. Select **Equals** as the operator.
      iv. Enter the city name: `Boston`.

      See *Filter a List* and *Filter by Numbers and Dates* for more filter options.
   o Enter keywords to search on and press return. See *Search Using Keywords*
3. More search options.

   o Group your results by selecting the attribute from the Group By field.

   o Change the columns displayed in the search results by clicking **Actions** and selecting **Manage Columns**.

   o Change the order of the columns with select and drag.

   o Change the default sort order using the controls at the top of each column.
4. Save your search and criteria as a new saved search (**Actions** > **Save**)

Related Topics
- Should I search by filter or keyword?

Search Using Keywords

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

Search Complete Words

1. When searching for an item, finish entering a complete word in the Ask Oracle bar.

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

2. Press **Return**.

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

Search Partial Words, Exact Phrases, and Use Operators

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

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

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

- Use the question mark (?) to match exactly one character. You can use this wildcard at the beginning, end, or middle of a word.

  For example, entering **Pri?e** returns Price, Prize, Pride.

- Put multiple search terms in quotes to search for exact phrases.

  For example, entering **"Pinnacle Corporation"** returns only Pinnacle Corporation, and any other records with those two terms in that specific order.

- Use the | (pipe) operator to search on multiple terms.

  For example, entering **Chicago|Pittsburgh**, finds accounts with those terms in the name. If searching on addresses is enabled, the results also include all accounts in Chicago or Pittsburgh.

- Use the - (minus) and + (plus) operators to narrow down your search.

  For example, entering **+Pinnacle -Technologies** when searching for accounts, returns all accounts with Pinnacle in the name, but not Pinnacle Technologies.

  When you use - (minus) operator followed by 2 or more words you must enclose the words in double quotes (" "). For example, entering **+Pinnacle -"Technologies Inc"** when searching for accounts, excludes Pinnacle Technologies Inc.

- You can enter multiple search terms separated by spaces.

  Spaces between words act as implicit + (plus symbol) operators. For example, entering Pinnacle Corporation finds all the accounts with those two words in the name, including Pinnacle Savings Corporation, Pinnacle Distribution Corporation, and Pinnacle Corporation.

Your search also returns similarly spelled words. Such "fuzzy" matches are rendered below exact matches. The most relevant items are always displayed first. The fuzzy match settings can be changed during setup. By default, the application displays spellings that are one letter off if the first three letters of the word match exactly. A keyword search on the term **Cernar**, for example, might return "Cerner" or "Cernas" in the search results. It won't return "Cesner", "Carner", or "Kerner".

Filter a List

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

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

1. Click in the search bar.
2. Enter your filters:
   - Some filters are numeric. For example, you can filter out accounts that have more than a certain number of leads, calls, contacts, and so on.
       i. Enter "Number" in the search bar.
       ii. Select the appropriate filter.
       iii. Select the operator, such as greater than or less than.
       iv. Enter the number.
   - With other filters, such as city, state, country, or industry, select the value to filter from your data.
       i. Enter `city` in the Ask Oracle bar.
       ii. You might see multiple options, depending on the filter, the object you're searching for, and how search is configured.
           - If you're filtering opportunities by city, select **Account: Primary Address: City**. If you're working with partners, search the primary addresses of all the partners **Partners: Partners: Primary Address: City**.
           - If you're filtering accounts by city, search the primary address (**Account: Primary Address: City**) or include all the addresses in the search (**Account: Addresses**)
       iii. Select the operator. For city, the available operators are any of the text-field operators listed in the *Available Operators* section.
       iv. Now select one of the available values. The most frequently used are listed first.
       v. Select more values from the list, or press **Return** to add the filter to the search.

       Your filters display in the Ask Oracle bar.
3. Remove a filter by clicking its remove icon.

Available Operators

Text fields, such as the account name or the name of the account owner, can include search operators listed in this table:

Text Search Operators	Function
All of the Words	All of the search terms must be present.
Any of the Words	Any of the search terms must be present.

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Text Search Operators	Function
Contains	The results include entries that contain the search term you enter.
Ends with	The results include entries that ends with the search term you enter.
Equals	The results must include the search terms in the exact case of the search term because searching on Equals is case-sensitive.
Exists	Finds the records with any value in the field.
Fuzzy Match	Finds records with similar spellings.
Is Missing	Finds all the records missing values.
None of the Words	The results exclude entries with the words you enter.
Not Equal to	Finds all records that don't match the search terms in their order.
Starts with	Finds all records that start with the search term you enter.

Numeric fields, such as opportunity Win Probability, can contain these search operators:

Numeric Search Operators	Function
Between	The results fall between two entries. **Note:** Workspace search doesn't include the To Date field value in the Date filter if using this operator. For example, let's say you perform a search for Opportunity records with the filter Close Date between 1/3/2021 and 1/5/2021. Workspace search returns all opportunity records having Close Date value as 03 January 2021 to 04 January 2021, but it doesn't return records having a close date of 05 January 2021. This is because Workspace considers the given filter values between 01-03-2021 12 AM and 01-05-2021 12 AM. Any records that have a value for 5 January 2021 won't be displayed in the results.
Equals	The number must equal the search term.
Exists	Finds the records with any value in the field.
Greater Than	Finds records with values greater than the entry.
Greater Than or Equal to	Finds records with values greater than or equal to the entry.
Is Missing	Finds all the records missing values.

Numeric Search Operators	Function
Less Than	Finds records with values less than the entry.
Less Than or Equal to	Finds records with values less than or equal to the entry.
Not Equal to	Finds all records not equal to the entry.

Filter by Numbers and Dates

You can filter your list by ranges of numbers and date fields. You can also specify that you want to see results lower or higher than a number or a date. And you can find all records with no entries.

Filter a List by Numeric Amounts

1. Click in the **Ask Oracle** bar.
2. Start entering the name of the numeric field and select it from the list. For example, enter **revenue** and select **Primary Revenue: Amount**.
3. Select one of the suggested amount ranges from the list, or click **Advanced Filter** for searches related to a specific revenue amount. For example, you can search for opportunities with revenues under or over $10,000, or for opportunities with no revenue.

Filter a List by Due Dates

For a task list or for appointments, you can search by due date using dynamic time periods such as this week or next week or by specific date ranges. Here's an example on filtering tasks in the Activities work area.

1. Enter **Due Date** in the **Ask Oracle** bar.
2. Select the **Due Date** filter from the list of suggestions.
3. You can filter one of two ways:
   - Select any of the suggested dynamic time periods such as **Next 30 days**, **This Week**, **Today**, **Last Month** and so on. Each range indicates how many records there are in each category.
   - To search by a specific date or search by other criteria, click **Advanced Filter**. For example:
     - Search for appointments prior to a date.
     - Search for all the appointments that are missing a due date.
     - Create your own dynamic queries. For example, you can search for all appointments in the next 5 days.

Group and Summarize Search Results

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

Group Search Results

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

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

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Summarize Revenue or Other Key Data in Each Grouping

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

1. Click the **Actions** button.

2. Select **Manage Group By**.
3. From the Manage Group By window, **Group Sort Order** field, select the groupings displayed on the page.
4. From the **Aggregate Field** field, select the attribute you want to summarize. For example, for leads, you might want to summarize each group by deal size.
5. From **Aggregate Function**, select how you want the summary information calculated. Select from:

   - Average
   - Maximum
   - Minimum
   - Sum

6. Click **Apply**.

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

Group By Fiscal Quarter

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

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

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Navigate to the Next or Previous Record

When you're working in a list, you can navigate to the next or previous record by clicking the **Next** and **Previous** arrows highlighted in the screenshot. Clicking the name of the list takes you back to the list view.

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

Search in Fields on Create and Edit (Details) Pages

In Sales for Redwood, some of the fields on the Create and Edit pages (the pages you open when you click the Details button) give you the same advanced search capabilities as the list pages within fields. You can search using words in the name or using related information. You can also use the same logical operators and wild cards. Like list pages, you can select a saved search to restrict the search to just the items of interest to you.

1. Place your cursor in the field to see recent and frequently accessed items.

   Here's a sample list of suggestions (callout 2) for the **Primary Contact** field (callout 1).

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

   You can also search on a combination of terms. For example, you can enter the account name and the city where it's located. For example, a search on Pinnacle (the account name) and Seattle (the city), gets you Pinnacle Technologies in Seattle.

3. You can narrow down the scope of your searches ahead of time by picking a saved search from the **Actions** menu (callout 1 in the screenshot).

   For example, to search only accounts where you're on the team or territory, select the **My Accounts** saved search (callout 2). The saved search name appears as a filter in the field name (callout 3)

> **Tip:** You may be able to search on attributes not displayed in the list of search results. For example, you may be able to search for accounts by the account owner although Owner isn't one of the columns in the results. Your application administrator can enable search on a large number of fields.

Which Attributes You Can Search

Here's a list of searchable attributes Oracle predefined for each create field.

- **Account**:

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Page	Attributes You Can Search
All create pages where the Account field appears.	Account Name, Account Primary Address, Primary Contact Name

- **Contact**

Page	Attributes You Can Search
Create Account	Contact Name, Job Title
Create Appointment	Contact Name, Job Title, Primary Account Name
Create Lead	Contact Name, Job Title, Primary Account Name
Create Opportunity	Contact Name, Job Title, Primary Account Name
Create Task	Account Name, Account Primary Address, Primary Contact Name

- **Lead**

Page	Attributes You Can Search
Create Appointment and Create Task pages	Lead Name, Account Name, Primary Contact: Name

- **Opportunity**

Page	Attributes You Can Search
Create Appointment and Create Task pages	Opportunity Name, Account Name

Search Partial Words, Exact Phrases, and Use Operators

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

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

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

- Use the question mark (?) to match exactly one character. You can use this wildcard at the beginning, end, or middle of a word.

  For example, entering **Pri?e** returns Price, Prize, Pride.

- Put multiple search terms in quotes to search for exact phrases.

  For example, entering **"Pinnacle Corporation"** returns only Pinnacle Corporation, and any other records with those two terms in that specific order.

- Use the | (pipe) operator to search on multiple terms.

  For example, entering **Chicago|Pittsburgh**, finds accounts with those terms in the name. If searching on addresses is enabled, the results also include all accounts in Chicago or Pittsburgh.

- Use the - (minus) and + (plus) operators to narrow down your search.

  For example, entering **+Pinnacle -Technologies** when searching for accounts, returns all accounts with Pinnacle in the name, but not Pinnacle Technologies.

  When you use - (minus) operator followed by 2 or more words you must enclose the words in double quotes (" "). For example, entering **+Pinnacle -"Technologies Inc"** when searching for accounts, excludes Pinnacle Technologies Inc.

- You can enter multiple search terms separated by spaces.

  Spaces between words act as implicit + (plus symbol) operators. For example, entering Pinnacle Corporation finds all the accounts with those two words in the name, including Pinnacle Savings Corporation, Pinnacle Distribution Corporation, and Pinnacle Corporation.

Your search also returns similarly spelled words. Such "fuzzy" matches are rendered below exact matches. The most relevant items are always displayed first. The fuzzy match settings can be changed during setup. By default, the application displays spellings that are one letter off if the first three letters of the word match exactly. A keyword search on the term **Cernar**, for example, might return "Cerner" or "Cernas" in the search results. It won't return "Cesner", "Carner", or "Kerner".

Export Search Results

From the landing page, you can export a maximum of 2,000 search results as either a Microsoft Excel or a .csv file. The exported file includes all of the columns displayed in your search results. The default 2,000 limit can be increased to a maximum of 10,000 by the administrator.

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

The file downloads to your computer.

Change Fields Display in the List

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

- Change sort order by clicking on any of the sort icons on the columns.
- Change which fields appear in the results:

  a. Click the **Actions** button.
  b. Select **Manage Columns**.
  c. Select the fields you want to display. You can search or scroll through the list.

- Change the order of columns:

  a. Click the column header.
  b. Drag the column to the new place.

- Adjust column width.

Search for Resources

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

Managers can narrow down the list to those resources they manage by selecting the **My Organization** saved search from the **Actions** menu (3 dots).

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

Search FAQs

Should I search by filter or keyword?

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

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

When should I search with filters?

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

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

What's the sort order in search results?

When you select a saved search, the results get displayed in the order defined in the saved search. That order can be based on the sort order of a particular column. You can always specify your own sort order by clicking the header on the columns. When you do a keyword search, the sorting order defaults to sort by relevance: the records with the highest number of hits are listed first. For example, searching accounts on the term "Redwood", lists accounts with Redwood in the name and addresses in Redwood City before listing accounts with Redwood in the account name only.

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

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4 Saved Searches

Saved Searches

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

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

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

- Create saved searches of your own.
- Hide the ones you don't like.
- Specify which one you like to see by default when you open a work area.

Manage Saved Searches

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

The Manage Saved Searches page anatomy.

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Opportunities - Manage Saved Searches

Done

Show in List	Default	Name	Created By	Shared With	Actions
✓ ①		My Favorite Opportunities ③④⑤⑥	Oracle	Everyone	...
✓		My List for Opportunities	Oracle	Everyone	...
✓		My Open Opportunities	Oracle	Everyone	...
✓	②	Open Opportunities	sara.salesrep	Only Me	...
✓	★	Open Opportunities	Sales.Admin	Everyone	...
✓		Open Opportunities Where I a...	Oracle	Everyone	...
✓		Opportunities at Risk	Sales.Admin	Everyone	...
✓		Opportunities Pipeline	Sales.Admin	Everyone	...

Callout Number	Column	Explanation
1	Show in List	Hide lists you don't want to see using the Actions menu (callout 7)
2	Default	The saved search that you see by default. You can specify a different default using the Actions menu (callout 7).
3	Name	Clicking on the name of the saved search displays the search results.
4	Created By	You can only delete or edit saved searches created by you.
5	Shared With	Unless you're a sales administrator, your saved searches are personal (Only Me). However, you can still shared them by sending them a link you create from the Actions menu.
6	Actions	The Actions menu (three dots) displays the available actions for each saved search.

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Callout Number	Column	Explanation

Save a Search

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

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

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

Share a Personal Saved Search

You can share a saved search you created by creating and sharing a link.

Here's how:

1. With your saved search displayed in the list page, click **Actions** > **Manage Saved Searches**.
2. Click **Actions** (the three dots icon) for your saved search and select **Share Via Link**.
3. Copy the link that appears in the **Shared With** column and share the link with others.

Hide a Saved Search

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

1. Navigate to the work area.
2. Click in the Ask Oracle bar and select **Manage Saved Searches**.
3. Click **Actions** (the three dots in the Actions column) for the saved search you want to hide and select **Hide from List**
   .

Set a Default Saved Search

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

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

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Rename or Delete a Saved Search You Created

You can only rename or delete saved searches you created.

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

5 Sales Dashboard

Search Across All Sales Information (Global Search)

Search all sales information from the Ask Oracle bar.

1. In the Sales Dashboard Ask Oracle bar, enter a search keyword.

Sales Dashboard

⊙ pinnacle		
🏢	**Pinnacle Technologies** 3903 Ambassador Caffery Pkwy,LAFAYETTE, LA 70503 *Joshua Baker*	Account
👥	**Pinnacle Technologies@Joshua Baker** Joshua Baker +1 (958) 555-1288	Sales Lead
🛒	**Pinnacle Technologies@Joshua Baker** $ 34,600 *Pinnacle Technologies*	Opportunity
🛒	**Pinnacle Technologies 650kW Hybrid Fuel Generator** $ 185,000 *Pinnacle Technologies*	Opportunity
🛒	**Pinnacle Technologies SolarCare Monitoring Control Panel** $ 222,600 *Pinnacle Technologies*	Opportunity
🔍	Search **pinnacle**	

2. If you see what you're looking for in the list of suggestions, drill down on the name. Or click the link to the parent object. For a lead, call the primary contact.
3. If you don't see the item, click **Search** at the bottom of the list.

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4. In the Search Results page, you can filter the list of results by object and other attributes.

5. To show only the results that you've interacted with recently, add the **Show Smart List** filter and set it to **True**. The filter displays the most relevant items to you as described in *Display the Most Relevant Items to You*.

Filter the Content of Your Dashboard

Depending on sales administrator setup, you can filter the contents of the sales dashboard by team, time period, territory, and product groups. When you select a filter the information in the tab KPI and appropriate charts are updated automatically. Only the active tab is filtered.

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For example, if you filter a sales dashboard tab showing the team pipeline on the name of one of your subordinates, the pipeline KPI and graph are updated with pipeline information specific to that individual's team.

To filter:

1. Click the name of the filter next to the **Ask Oracle** bar.

   The filter moves to the bar.
2. Click the filter again and select the value.

Different Ways of Creating Charts for Your Dashboard

As a salesperson or a sales manager, you can create your personal charts and reports for your sales dashboard in two ways:

- Use AI to generate simple charts on the spot.

  You enter a prompt, such as "show opportunities by sales stage for the Standard Sales Process sales method", in the Ask Oracle bar, and the Sales Analyzer agent creates the chart for you.

  Things to know:

  - For salespeople, the charts are temporary. Only sales administrators can save them in the library and add them to the dashboard.
  - What attributes you can include in charts depends on Adaptive Search setup.
  - You're limited to grouping the data by one attribute. For example, you can have the Sales Analyzer create a bar chart showing the number of opportunities for each of your team members by sales stage, but you can't generate a stacked chart that shows the number of opportunities and revenue by sales stage.

  For details, see the topic *Create a Chart from a Prompt*
- Use the Express Reports feature to create reports that use the power of Oracle Transactional Business Intelligence (OTBI) without the complexity.

  As a salesperson, you can save the reports and charts that you create and add them to your sales dashboard, provided you have the personalization privilege. Sales administrators can add express reports to the dashboards they create for the sales organization.

  With Express Reports, you can:

  - Quickly build trend analysis reports on large sets of historical data.
  - Include predefined metrics in reports to easily see trends, such as win-loss trends in the pipeline, and other key performance indicators.
  - Group data by several factors. Group revenue by product and state, for example.
  - Take advantage of prebuilt visualizations to display the trends and key performance indicators.

  For information on Express Reports, see the *How do I get started with Express Reports?* playbook.

Sales administrators also have more ways of creating and adding charts to the sales dashboard. For information on the Visualization Configuration tool and other ways of adding charts and tables, see the *How do I configure the Sales Dashboard in the Redwood User Experience?* playbook.

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Create a Chart from a Prompt

Create charts by entering prompts into the Ask Oracle bar.

> **Note:** Only attributes the administrator has enabled for the **Group by** option in Adaptive Search setup are available for chart creation using prompts.

1. Enter your prompt starting with the verb "show". Be as specific as possible. For example, enter: **show lost opportunities by sales stage for the Standard Sales Process sales method** .
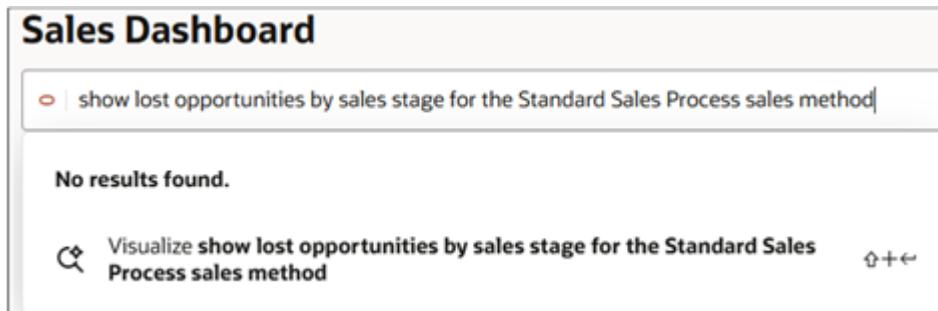
   Sales Dashboard

   ⊖ | show lost opportunities by sales stage for the Standard Sales Process sales method|

   No results found.

   ⌕ Visualize **show lost opportunities by sales stage for the Standard Sales Process sales method**   ⇧+←

2. When you see the **Visualize** prompt, click it or press the **Shift** and **Return** keys on your keyboard.
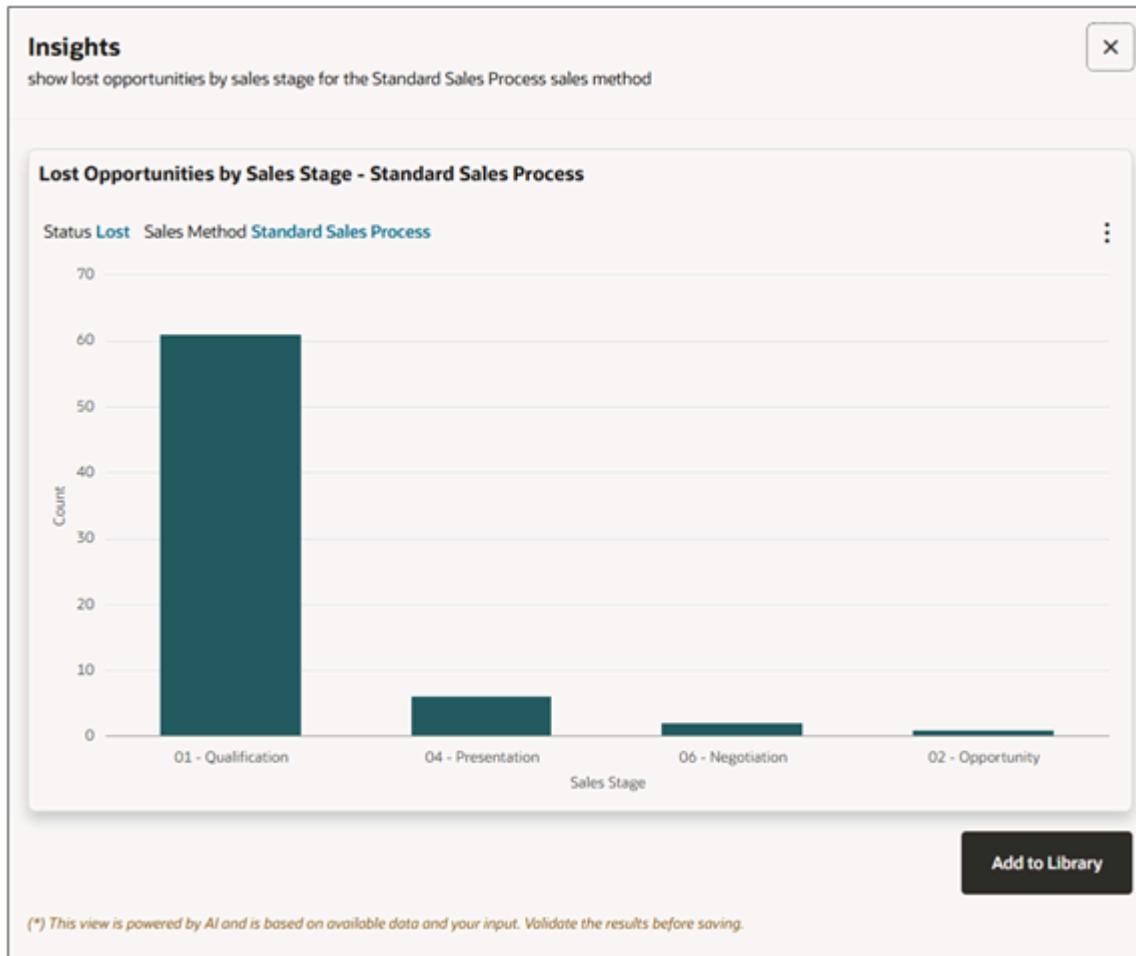
3. You can update the dimensions or metrics of the visualization by clicking the **Action** (3 vertical dots) icon. Depending on the graph type, you can change:

   ◦ The attribute on the x-axis

   ◦ The attribute that's used to categorize the data

   ◦ Graph orientation

   ◦ Graph stacking

4. If you aren't satisfied with the result, rephrase your prompt.

5. If you have sales administrator privileges, you can save the visualization by clicking **Add to Library**.

   The visualization appears in the list of available visualizations when you edit the sales dashboard layout using the **Edit Page Layout** button.

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Generate Insights from Sales Dashboard Graphs

You can have an AI agent generate insights into the business data underlying the visualizations in the sales dashboard. You can then ask follow-up questions to obtain more details.

To generate insights:

1. Click **Action** (the 3 vertical dots) on the graph and select **Insights**.
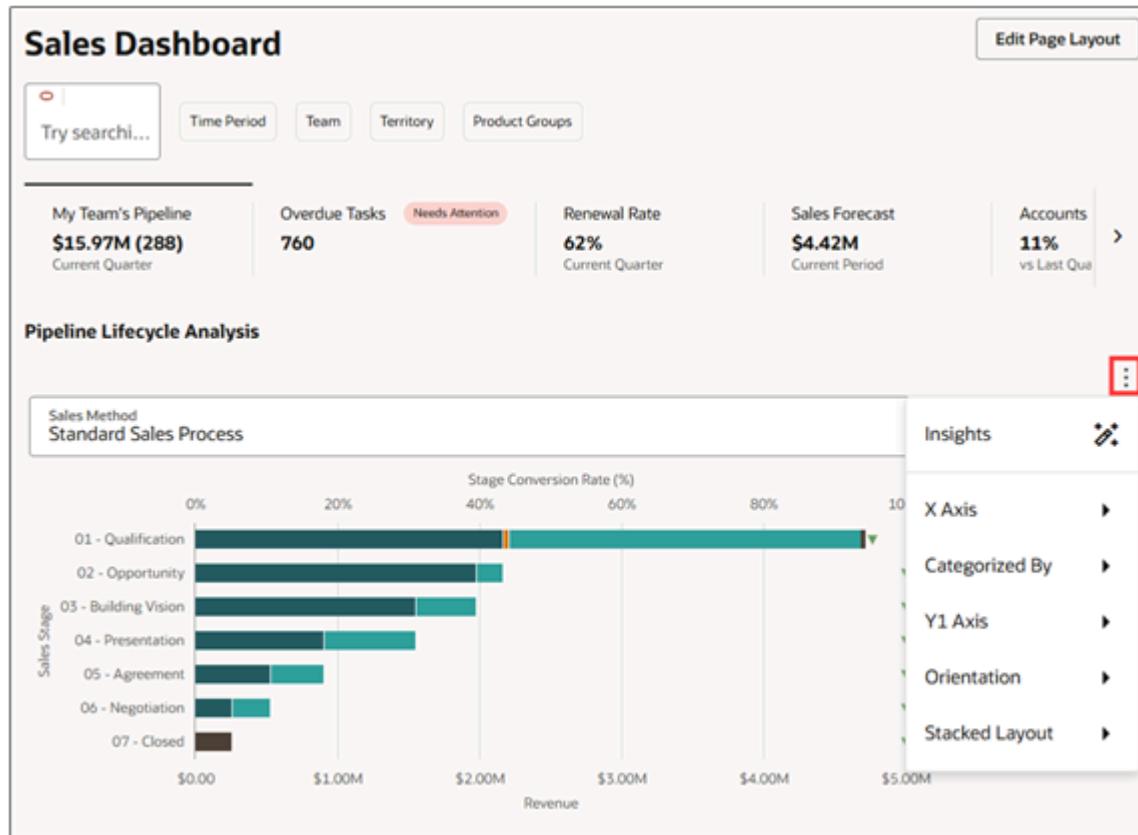
The Generate Insights AI agent opens a drawer and takes a few seconds to generate the initial insights.

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2. You can enter any number of follow-up questions. The types of questions you can ask include but aren't limited to:

   ○ Clarification

   ○ Comparison

   ○ Root cause analysis

   ○ Deep dives

   ○ Anomalies and outlier detection

   ○ Trend analysis and forecasting

   ○ What if scenarios

   ○ Next steps for you to follow

   For question examples, see the topic *Types of Questions You Can Ask About Your Sales Dashboard Visualizations*.

Types of Questions You Can Ask About Your Sales Dashboard Visualizations

Here are some examples of the types of questions you can ask about visualizations on the sales dashboard.

Each section lists sample questions for a particular visualization.

Leads by Status and Owner for the Last Month

Question Type	Sample Questions
Clarification	• What's the total deal size of qualified leads across all reps? • Which rep owns the largest share of unqualified leads? • Which rep has the highest total revenue at risk? • What proportion of Anne Lenox's pipeline is classified as high risk compared to medium risk?
Comparison	• How do qualified leads compare with converted leads in terms of total deal size? • Which rep has the highest conversion rate compared to others this month?
Root cause analysis	• Why are many leads remaining in the qualified stage without progressing to conversion? • Are there specific reps or territories where leads are more likely to end up unqualified?
Deep dives	• Can you break down the converted leads by industry to see which verticals are converting better? • Within qualified leads, which product categories have the largest deal size?
Anomalies and outlier detection	• Are there any reps with unusually high unqualified lead percentages compared to the team average? • Do any leads have deal sizes far above or below the normal range in each stage?
Trend analysis and forecasting	• How does this month's lead conversion rate compare to the last 3 months?

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Question Type	Sample Questions
	• If the current pace continues, how many leads are likely to be converted next quarter?
What if scenarios	• What if we improved conversion rates for qualified leads by 10% — how much additional revenue would that generate? • If we redistributed unqualified leads to top-performing reps, how many could potentially be converted?
Next steps	• Which reps should prioritize follow-ups to maximize conversions next month? • What are the top 3 common objections from unqualified leads that we should address as a team?

My Team's Opportunities at Risk

Question Type	Sample Questions
Clarification	• Which rep has the highest total revenue at risk right now? • What proportion of Anne Lenox's pipeline is classified as high risk vs. medium risk?
Comparison	• How does the total revenue at risk for Quinn Weber compare to Rory Morrow? • Which rep has the lowest revenue at risk compared to the rest of the team?
Root cause analysis	• Why does Anne Lenox have such a high volume of opportunities in the high-risk category? • Are there common reasons or deal stages where opportunities are slipping into risk across multiple reps?
Deep dives	• Can you list the top 5 accounts contributing to high-risk revenue for Anne Lenox? • Which specific deals under Rory Morrow are contributing to the medium-risk category?
Anomalies	• Are there any reps showing unusual spikes in risk compared to their historical averages? • Which opportunities have been stuck in risk status the longest without movement?
Trend analysis	• How has the total revenue at risk trended over the last 3 months across the team? • If the current trend continues, how much of the team's pipeline might remain in risk status next quarter?
What if scenarios	• Lenox manages to recover 50% of her high-risk opportunities — how much revenue could that add back? • If Quinn Weber reduces medium-risk deals by half, what impact would that have on overall pipeline health? • What happens if all reps improved their opportunity risk mitigation by just 10%?
Next steps	• Which reps should I prioritize coaching to reduce high-risk deals immediately? • What specific accounts need urgent follow-up this week to prevent revenue loss? • What early warning signals should the team track to stop deals from falling into risk? • What are the top 3 recommended actions for each rep to improve their opportunity risk profile next month?

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My Team's Opportunity Pipeline Distribution

Question Type	Sample Questions
Clarification	• Which rep has the highest total revenue in their pipeline? • Who has the highest number of opportunities regardless of revenue size?
Comparison	• How does Anne Lenox's revenue compare with Rory Morrow's? • Which rep has a higher average deal size — Anne Lenox or Quinn Weber?
Root cause analysis	• Why does Anne Lenox have significantly higher pipeline revenue compared to other reps? • Are reps with fewer opportunities also working on smaller deal sizes, or is it just fewer deals overall?
Deep dives	• Can you break down Anne Lenox's opportunities by stage to see where most of her revenue is concentrated? • Which accounts are contributing most to Rory Morrow's revenue pipeline?
Anomalies	• Are Anne Lenox's large deals unusually concentrated in a few accounts compared to the team? • Which reps have unusually high opportunity counts but relatively low revenue, suggesting small deal sizes?
Trend analysis	• How has the pipeline revenue distribution across reps changed over the last 3 months? • If each rep maintains their current pace, what will their revenue contribution look like by the end of the quarter?
What if scenarios	• What if Rory Morrow increased his average deal size to match Anne Lenox's — how much additional revenue would that generate? • If Quinn Weber doubled the number of opportunities in his pipeline, what would his total revenue look like? • What happens if Anne Lenox loses her top 2 largest deals — how does it impact the overall team pipeline?
Next steps	• Which reps need immediate coaching to improve deal size or volume in their pipeline? • What should the team focus on this month to balance pipeline distribution across reps? • Which specific accounts should be prioritized to quickly increase revenue for underperforming reps? • What cross-team best practices from Anne Lenox's pipeline management can be shared with other reps?

Products Generating Revenue of More than $1M in the Last 3 Years

Question Type	Sample Questions
Clarification	• Which product contributes the majority share of revenue above $1M in the last 3 years?

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Question Type	Sample Questions
	• What percentage of revenue is contributed by all other products combined (excluding the top one)?
Comparison	• How does the revenue share of Activity Hub B2C compare to 6500RT Servers? • Which product has the smallest contribution, and how much lower is it compared to Accessories?
Root cause analysis	• Why is the revenue so heavily concentrated in the "Category under GCM Total Unspecified"? • Are the lower-performing products in this chart underinvested in sales/marketing or lacking demand?
Deep dives	• Can you break down the "Category under GCM Total Unspecified" into sub-products or offerings? • For Activity Hub B2C, which regions or industries contributed most to its $1M+ revenue?
Anomalies	• Is the dominance of one category a normal trend, or is it an anomaly compared to other years? • Are there products that nearly crossed the $1M threshold but fell short due to bottlenecks like pipeline gaps or delivery delays?
Trend analysis	• How has the revenue share of these top products changed year-over-year in the last 3 years? • Based on current trends, which product is most likely to cross $2M revenue next year?
What if scenarios	• What if the revenue from the top product declines by 10% — how would it impact the overall distribution? • If investment in 360Commerce ISO doubled, what could its revenue contribution look like in the next 3 years? • What happens if all smaller categories (below 3%) are consolidated into one offering — how much market share would that represent?
Next steps	• Which smaller products should we prioritize for investment to diversify revenue? • What specific actions could increase Activity Hub B2C's share beyond its current level? • How should the sales team balance focus between defending the dominant product's revenue and growing emerging products? • What product-level adjustments (pricing, bundling, or cross-selling) could help boost underperforming categories?

Pipeline Lifecycle Analysis

Question Type	Sample Questions
Clarification	• Which stage currently holds the largest revenue in the pipeline? • What is the overall conversion rate from qualification to closed won?
Comparison	• How does the revenue in the Qualification stage compare with the Opportunity stage? • Which stage has the highest drop-off rate compared to the previous stage?
Root cause analysis	• Why are so many deals concentrated in the Qualification stage rather than moving forward? • At which stage do we lose the most deals, and what are the common reasons behind it?

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Question Type	Sample Questions
Deep dives	• Can you break down the lost opportunities in the Presentation stage by industry or account type? • Which accounts or reps are most successful at progressing deals from Negotiation to Closed Won?
Anomalies	• Are there any stages where the conversion rate is significantly below expectations compared to benchmarks? • Which deals have been stuck the longest in the Agreement stage, creating bottlenecks?
Trend analysis	• How has the stage conversion rate for the Opportunity stage changed in the last 3 quarters? • Based on current conversion rates, how many deals are likely to close successfully by the end of the quarter?
What if scenarios	• What if we improved the conversion rate in the Building Vision stage by 10% — how much additional revenue would move forward? • If the drop-off in the Qualification stage is reduced by half, how would it impact overall pipeline health? • What happens if all deals in the Negotiation stage close successfully — what would be the total revenue impact?
Next steps	• Which stage should the team focus on immediately to improve overall pipeline progression? • What specific actions can sales managers take to reduce losses in the Opportunity stage? • Which reps need targeted coaching to improve performance in midfunnel stages like Building Vision or Presentation? • What playbooks or enablement materials should be introduced to help increase conversion at the Agreement stage?

Personalize Your Sales Dashboard

You can add, remove, and rearrange content to create your own personal dashboard. You can add content provided by administrators as well as visualizations that you created from prompts and using the Express Reports tool.

When you edit the sales dashboard, that personalization is available only to you. You can't share it.

Click the **Edit Page Layout** button to open the editing mode.

Use the **Library** pane to add content. To move an remover items, hover over them and use the controls.

Library Pane Functions

Callout	Feature Description
1	Use the **Actions** menu to restore the original dashboard.
2	Search for content.
3	The **KPI** filter displays the content available to create the top of a tab. The **Visualizations** filter lists the content you can add to the tab itself.
4	Drag items into place using the handles.

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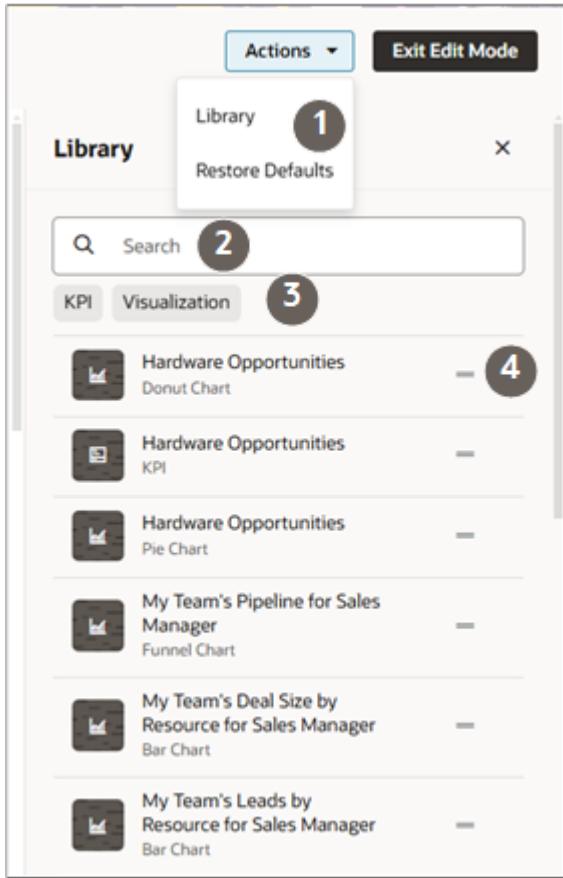
Create Tabs

You can create your own tabs. Here's how:

1. In the **Library** pane, click **KPI** to view the available KPIs that you can use for the top of your tab.
2. Drag one of the items next to one of the existing tabs on the sales dashboard.
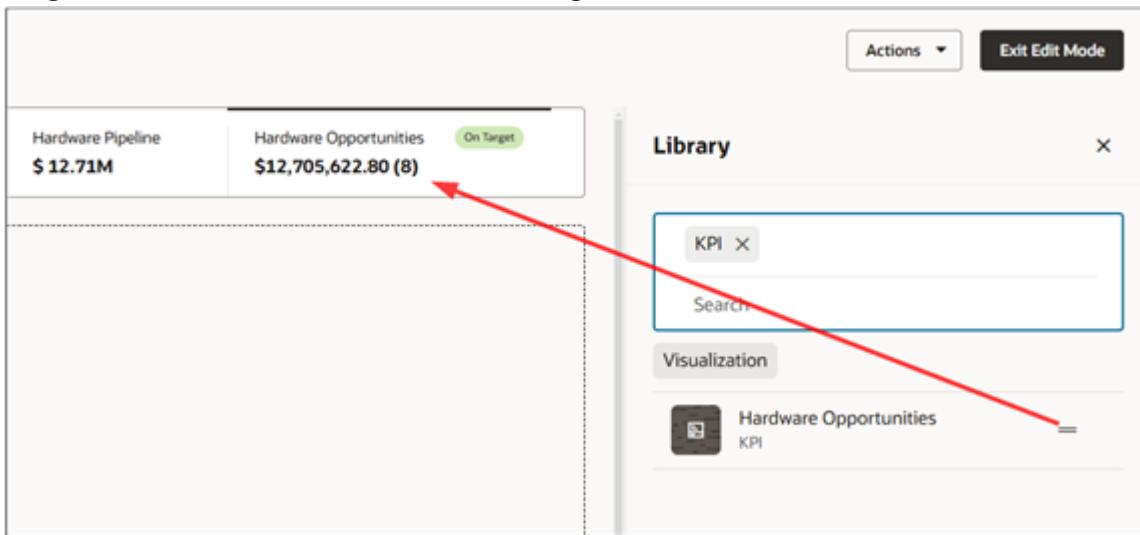
3. You're now ready to add content.

Add Content to an Existing Tab

You can have maximum of 5 items in a tab. You can add:

- Charts and tables created by administrators in the Visualization Configuration tool.

- Charts that you created by entering prompts in the Ask Oracle bar and saved in the library.

- Express Reports that you've created and those shared with you by an administrator.

> **Note:** The library includes all available visualizations and express reports. Some may not be applicable for your role in the organization. You may not have permission to view the data in some charts, for example.

Here's how to add content:

1. In the **Library** tab, click the **Visualizations** button.
2. Search for what you want to add in the library.
3. Use the handles to drag the item into place on the dashboard.

Move and Remove Content

- To move an item, hover over it and drag using the handle.

- To remove an item, hover over it and click **Actions** > **Remove**
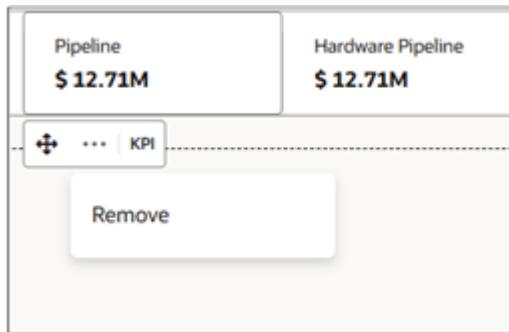
Restoring the Default Dashboard

You can restore the original dashboard, by clicking **Actions** > **Restore Defaults** (the button at the top of the page).

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6 Leads

Create Leads and Close Deals

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

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

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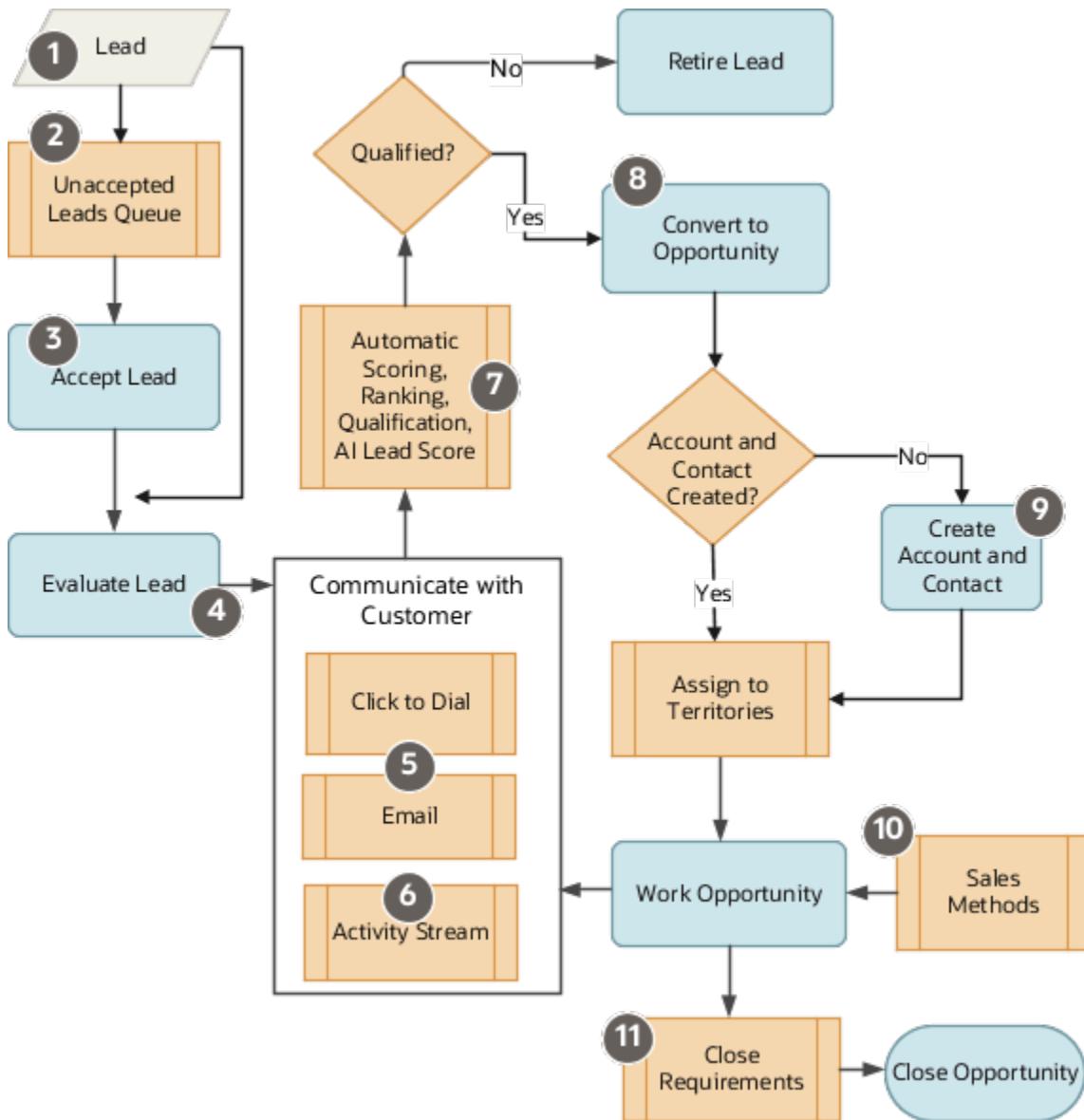
Sales Process Steps	Sales for Redwood Features
Leads are created in the application, or you import leads from outside sources (callout 1 in the process).	Both net new leads (new prospects) as well as existing customer leads (for renewals/upgrade/cross-sell or up-sell) are supported. When you create a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

Lead Types

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

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

- You create the account and contact before you create the lead

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

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

Create a Lead

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

- If you know the account and contact don't yet exist in your application, you can enter the account and contact names in the lead as text. As you type account and contact names, the application suggests any matching accounts and contacts. If you find right match, you can select it. If not, you can continue with typed values to create a net new lead.

- If you know that both the contact and account exist in your application, then create the lead from the contact. When you do, the lead gets automatically populated with the account and contact information. When you start with the contact, you also get an overview of the existing leads associated with the contact and the history of past interactions with the contact.

- If you know the contact is a new contact for an existing account, you can create the contact first and then create your lead. Or you can review the account information first and create the contact and lead from there.

Create a Net New Lead

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

1. In the Leads work area or in the Sales Dashboard, place your cursor in the Ask Oracle bar and click **Create Lead**.
2. In the Create Lead page, enter the contact name in the **Primary Contact** field. The application searches and displays any existing matches. If there's no existing contact with that name, select the name from the list.
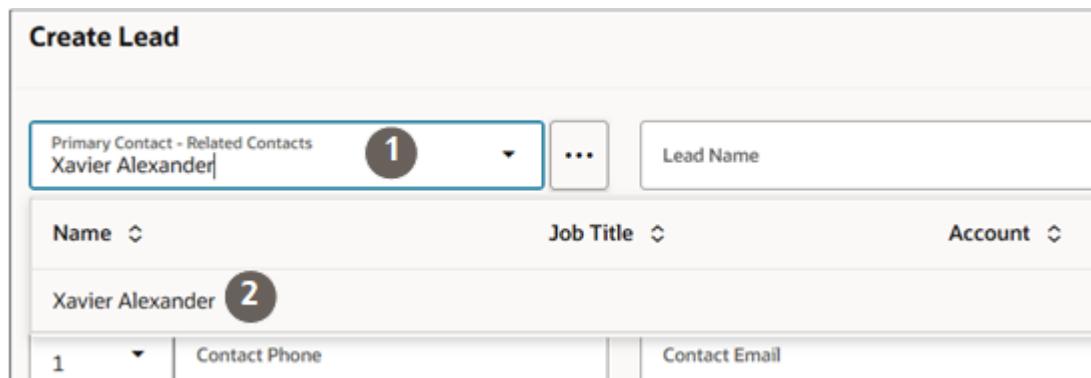
3. Enter the lead name and other details.
4. Click **Save**.

5. You can now take any of the available actions on the lead. Just put your cursor in the Ask Oracle bar, enter the action, and press **Return**. Here are some examples:

    o To indicate product interest, for example, enter `add` and select **Product** from the list.

    o To send an email, enter `email`.

    o To call the contact in the lead, enter `call`.

Create a Lead from the Contact

1. On the home page, click **Contacts** to open the Contacts work area.

    The page displays a list of contacts generated by the default saved search. Each saved search comes with predefined filters that restrict what contacts you can search. For example, the My Contacts list displays all the contacts where you're listed as the owner.
2. Click in the search bar and select the appropriate saved search.
3. Enter the contact's name in the search bar. Include both first and last name in your search for common names.
4. Press **Return** to initiate the search.
5. Click the contact's name in the search results.
6. In the contact page click in the Ask Oracle bar and enter: `create`, and select **Create Lead**.
7. In the Create Lead page, edit any of the defaulted information.
8. Click **Save**.
9. You can now take any of the available actions on the lead. Just put your cursor in the Ask Oracle bar, enter the action, and press **Return**. Here are some examples:

    o To indicate product interest, enter `add` and select **Product** from the list.

    o To send an email, enter `email`.

    o To call the primary contact in the lead, enter `call`.

    o To qualify the lead, enter `Qualify`.

Accept a Lead to Work On

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

1. In the leads list page, click in the search box and select the New Unaccepted Leads saved search.
2. There are two ways to accept a lead:

    o From the list page:

        i. For the lead you want to work on, click **Actions** (the three dots).
        ii. Select **Accept**.

    o While viewing the lead details:

        i. In the Ask Oracle bar, enter **Accept**.
        ii. Select the **Accept** action.
3. Confirm that you're accepting the lead.

4. To view more unaccepted leads, click the list name or the up arrow to return to the list, or click **Next** on the top right side of the page to open the next lead in the list.

Accept or Qualify Multiple Leads at the Same Time

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

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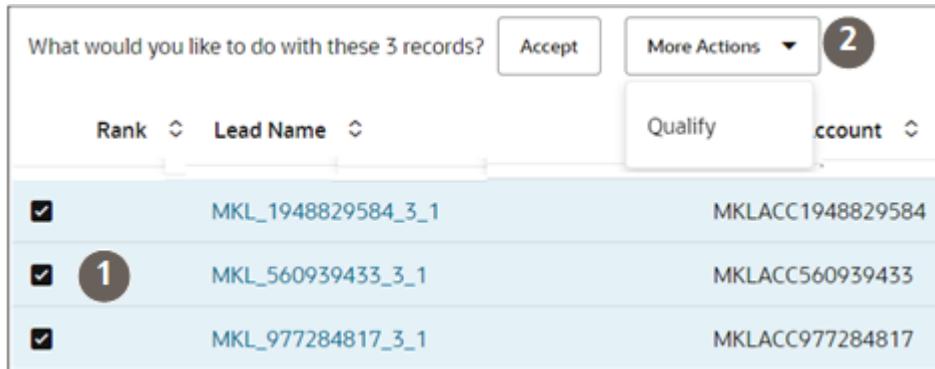
Add Products to a Lead

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

1. Open the lead that you want to update.
2. In the Ask Oracle bar, enter `add` and select **Add Products**.
3. You can add multiple products or product categories.

> **Note:** The list of products and product categories may be filtered to show only the products or product groups in your assigned territories. If this is the case, you can click the **...** actions button next to the field to show all products or product groups.

Update Lead Information

Here's how to update lead information:

- To update basic information, such as the primary contact, account, address, and so on, click **Lead Details** and **Edit**.
- Use the Ask Oracle bar to update individual fields:

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- ○ Enter **update** and select the field you want to update, including account name, contact phone, description, and so on.
- ○ Enter **add** to add information such as contacts, team members, and attachments.
- ○ Enter **create** to add notes, tasks, and appointments.

Predict Lead Conversion Using AI Scores

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

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

Qualify a Lead

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

1. Open the lead.
2. Enter `qualify` in the Ask Oracle bar and press **Return**.
3. Confirm the action.

Convert a Lead Into an Opportunity

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

1. Open the lead.
2. Enter **convert** in the Ask Oracle bar and press **Return**.
3. In the Convert Lead window, you can change the opportunity name, enter an account and contact, and reassign opportunity ownership.
4. Click **Submit**.

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

Retire a Lead

Here's how to retire a lead:

1. Open the lead.
2. Enter **retire** in the Ask Oracle bar and select the **Retire** action.
3. In the Retire Lead window, select a retire reason and optional comments.
4. Click **Submit**.

Add an Attachment to a Lead

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

1. Open the lead.
2. Enter `attach` in the Ask Oracle bar.
3. Press **Return**.
4. In the Attach window, you can:

   - Drag and drop your files.
   - Click **Add** (the plus sign) and select a file to attach.
   - Enter a URL and click **Add URL**.
5. Click **Close**.

Delete a Lead

You can delete individual leads. Here's how:

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

View Lead Details in Oracle Eloqua

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

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7 Accounts and Contacts

Accounts

Accounts Overview

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

From the Accounts work area, you can:

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

This table highlights some of the key details:

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

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Accounts Landing Page

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

Click an account to see the details.

Account Information

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

Hierarchy

The panel shows default hierarchy rollups, such as:

- Total number of accounts in the hierarchy

- Revenue from won opportunities

- Potential Revenue from open opportunities

- Open opportunities

The panel shows the address details and the total child accounts of the parent company of the account.

Click **View Account Hierarchy** for more information, such as the subsidiaries of the account, their primary contacts, and addresses. You can toggle between the tree table view and the grid view. You can use the breadcrumbs to navigate through the hierarchy. Drill down the Open Opportunities and Won Opportunities columns on the Opportunity summary tab to view the amounts of individual child records and cumulative amounts of parent records including its child record amounts.

Information Related to Accounts

You can view information related to accounts in the panels on the account overview. Some panels provide recommendations. Others provide information and access to objects related to accounts. Which panels appear, depends on setup by your administrator.

Here are a few of the common panels you might see on an account:

Contacts

The Contacts panel:

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

- The phone number appears as a link for a contact. Click the link to make a call using the built-in telephony.

- To see the complete list of contacts, click **View All Contacts**.

Opportunities

The Opportunities panel:

- Shows the rolled-up value of potential revenue from open opportunities.

- Opportunities are sorted by the last updated date, current stage, and the expected revenue from the opportunity.

- To see the complete list of opportunities, click **View All Opportunities**.

Leads

The Leads panel:

- Shows the rolled-up value of the number of open leads and potential revenue from the leads.

- Leads are sorted by the last updated date, status, lead score, and deal size. You can also see the related leads and can navigate to their details.

- To see the complete list of leads, click **View All Leads**.

Quotes and Orders

Note the following about the Quotes and Orders panel:

- You can see the Quotes and Orders panel only if it's enabled. Otherwise, use the Ask Oracle bar to view the quotes and orders of the account.

- The panel lets you see the potential revenue from open and processing orders, and revenue earned from closed orders. Quotes and orders are sorted by the last updated date.

- To see the complete list of quotes and orders, click **View All Quotes and Orders**.

Service Requests

The Service Requests panel:

- Shows the rolled-up value of the number of critical service requests and the total open service requests on the account.

- Service requests are sorted by status, criticality, and the last updated date. You can also see the related service requests and can navigate to their details.

- To see the complete list of service requests, click **View All Service Requests**.

Assets

The Assets panel:

- Shows the rolled-up value of the number of active assets of an account.

- Assets are sorted by the status, unit price, and the last updated date.

- To see the complete list of assets, click **View All Assets**.

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Create an Account

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

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

   Your administrator can enable all the fields that are mapped with D&B on the Create Account page to get the entire firmographic data.
3. Select an **Account Type**, which will be Customer or Prospect. A customer is the organization you're already doing business with. A prospect is a potential buyer.
4. Click **Create**. The data quality tool for deduplication checks for duplicate accounts and shows them in a dialog box. You can proceed with creating an account or cancel the process and update a matching account.

Account Updates

Use the Ask Oracle bar to update a single detail of an account, such as the phone, contact, or website.

Here's a sample of the Ask Oracle bar retrieving "update" items:

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

The Ask Oracle Bar Functions on an Account

Use the Ask Oracle bar to see the attachments and sales team of an account.

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

See the *Ask Oracle Bar at the Top of the Record Overview* in the Basics chapter of this guide for more information.

See Similar Accounts for an Account in Oracle Sales

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

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

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

Here's how you can see the similar accounts:

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

   The account foldout view appears.
3. In the Ask Oracle bar, enter **Show Similar Accounts**.

   The similar accounts list appears.

Related Topics
- Overview of Sales Machine Learning

See Sales Invoices for an Account

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

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

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

Invoice Statuses

Invoices of an account are in one of these statuses:

- Overdue
- Due
- Due Now
- Paid

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

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The table describes the invoice statuses.

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

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

Contacts

Contacts Overview

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

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

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

Contacts Landing Page

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

Contact Information

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

Send a Contextual Email

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

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

Related Topics
- Email Integration Options for Oracle Sales in the Redwood User Experience

Make a Call

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

Schedule Appointments and Create Tasks

Use the Ask Oracle bar to create an appointment. Appointments can be calls, meetings, chats, emails, texts, or web conferences.

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

Related Topics
- Place an Outbound Call

Access Social Profiles

Access the LinkedIn and Eloqua profiles of a contact.

LinkedIn Sales Navigator

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

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

Click the LinkedIn link on a contact basic information to *see the LinkedIn profile* of the contact.

Eloqua

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

See the LinkedIn Profile of a Contact

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

1. Navigate to **Redwood Sales** > **Contacts**.
2. Open a contact from the landing page.
3. In the contact basic information area of the Contact foldout view, you find the **Reference** label that shows the **LinkedIn** link. Click the link.

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

   The LinkedIn Sales Navigator instance opens in a new tab.
4. Sign in to LinkedIn Sales Navigator.

   The tool finds and shows matching profile for a contact.

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

LinkedIn Sales Navigator Finds Matching Profile

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

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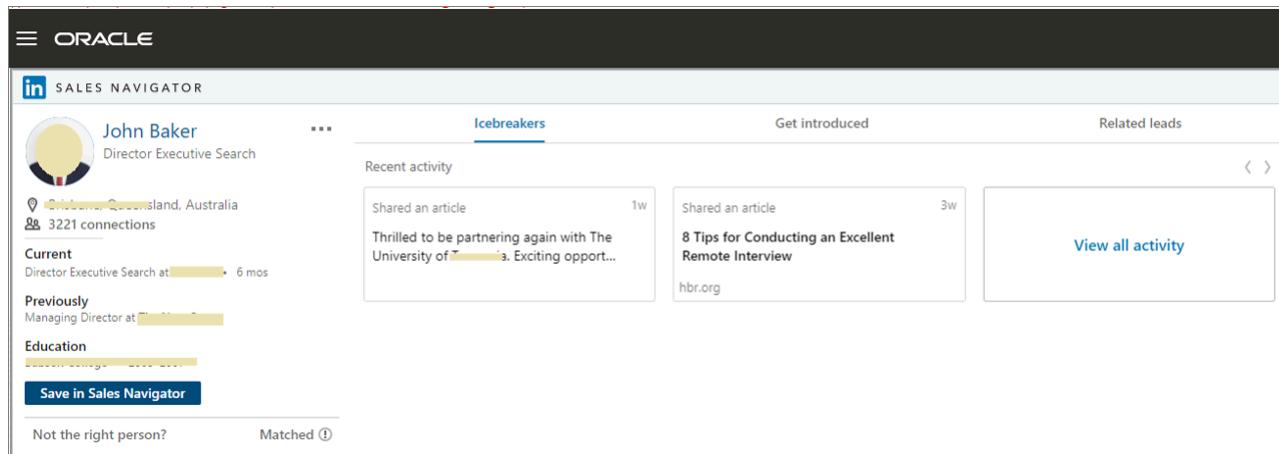
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If the exact profile isn't found, LinkedIn shows possible matches, allowing you to choose the right profile. Here's a screenshot of LinkedIn Sales Navigator that has fetched several similar profiles when an exact match isn't found.

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

Task	Description
View Profile	View the complete LinkedIn profile details of an account, contact, or lead.
Connect	Request to connect on LinkedIn by sending an invite.
Send Message or Send InMail	Send messages to first-level connections. Alternatively, use an InMail to connect with contacts or leads at other levels.
Icebreakers	Explore common interests and conversation starters with the selected account, contact, or lead.
Get Introduced	Request an introduction through a mutual connection.
Match Profile	Associate an accurate profile when LinkedIn suggests multiple profiles that match with an account, contact or lead. Once associated, you can see the matched LinkedIn profile in your account, contact, or lead records.

Task	Description
Not this person	Use this option if LinkedIn displays profiles that don't belong to the selected account, contact, or lead.

Related Topics
- Overview of LinkedIn Sales Navigator
- Overview of LinkedIn Sales Navigator Integration Setup

The Related Objects of Contacts

See contact-related details in the panels view.

Activities

- The Activities panel shows pending and overdue tasks and scheduled appointments. The panel shows completed interactions, such as calls made and emails sent, along with the time stamp.

- To see the complete list of activities, click **View All Activities**.

Opportunities

- Opportunities are sorted by the Open or Closed status. Open opportunities are sorted by the closed date and closed opportunities are sorted by won, lost, and actual closed date.

- To see the complete list of opportunities, click **View All Opportunities**.

Leads

- Leads are sorted by open, converted or retired, and creation date. You can also see the related leads and navigate to the details.

- To see the complete list of leads, click **View All Leads**.

Service Requests

- Service requests are sorted by the Open and Closed status, by severity, and then by last updated date. You can see related service requests and navigate to the details.

- To see the complete list of service requests, click **View All Service Requests**.

Contact Updates

Use the Ask Oracle bar to update a single detail of a contact, such as the phone or email.

Here are some of the contact update options:

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> update Prefix

Suggestions

Update Prefix

Update Buying Role

Update Affinity

Update Owner

Update Phone Number

Update Middle Name

Update Last Name

Update Job Title

Update Address

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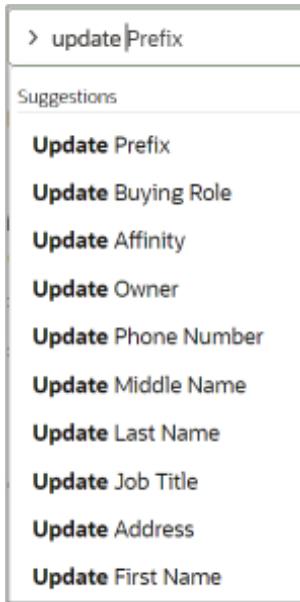
If you have changes to the basic information of a contact, go to the Contact Properties page by clicking **Contact Details**. Make the changes and save.

The Ask Oracle Bar Functions on a Contact

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

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

Campaigns for Your Contacts

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

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

Privileges to View and Add Campaigns

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

- The View Marketing Integration Campaigns privilege to see the Campaigns panel and the Show Campaigns option in the Ask Oracle bar.

- The Manage Marketing Integration Campaign Members privilege to add campaigns for contacts.

Talk to your administrator to get the privileges.

The Campaigns Panel

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

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

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

Campaign-Related Actions from the Ask Oracle Bar

- **Show Campaigns**: In the Ask Oracle bar of a contact's foldout view, type in **Show Campaigns** to see the campaigns sent to the contact.

- **Delete Campaigns**: If you want to discontinue a campaign for a contact, you can remove it by selecting the **Delete** option from **Actions**.

- **Add Campaigns**: To add campaigns for a contact, type in **Add Campaign** in the Ask Oracle bar. On the Add Campaign page, search for a campaign using the search list. You can see a list of active campaigns with the details such as Type and Status. Select a campaign and click **Add**.

Email Addresses and Phone Numbers

Contact Preferences for Calling and Email

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

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

- Calling preferences:

    - **None**: You don't know the preference for the number. This is the default.

    - **Do Not Call**: The contact doesn't want to be called at the number.

    - **OK to Call**: The contact gave permission to call at the number.

- Email preferences:

    - **None**: You don't know the preference for the email address. This is the default.

    - **Do Not Email**: The contact doesn't want to receive email at the email address.

    - **OK to Email**: The contact gave permission to receive email at the email address.

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

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

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

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

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

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

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

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

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

- On the contact record itself, the contact preferences for the mobile phone, the work phone, and email address are visible on the contact summary and on the Contact Details (Edit) page where you set them.
- To see the preferences for all phone numbers of a contact, enter **Show Phone Numbers** in the Ask Oracle bar.
- On leads, you can view the contact preferences for the primary contact listed at the top of the record overview pages, on the Contacts panel, and in the list of all contacts.
- For accounts, contact preferences are displayed next to the contacts in the Contacts panel and in the page listing accounts when you click **View All Contacts**.
- On opportunities, you can see the contact preferences in the Contacts panel and in the list of all contacts that you can display by clicking **View All Contacts**.

Related Topics
- Get a List of Contacts That Are OK or Not OK to Call or Email
- Get a List of All Phone Numbers, Email Addresses, and Street Addresses

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

Display the contact record and enter **Show Phone Numbers** in the Ask Oracle bar.

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

- **No icon**: Preference is unknown. This is the default.

- **Do Not Call icon**: The contact doesn't want to be called at the number.

- **OK to Call icon**: The contact gave permission to call at the number.

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

- **Do Not Contact**

- **OK to Contact**

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

Phones, Email Addresses, and Street Addresses

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

- When you're creating an account, you can enter one phone number and one street address, but no emails.

- When creating a contact, you can enter a work number, a mobile number, and one email address. You can enter one street address for the contact or use the address of the account associated with the contact.

- After the account or contact is created, enter you can enter additional phone numbers, email addresses, and street addresses, using the Ask Oracle bar. Just enter: **Add Phone Number**, **Add Email Address** or **Add Address**.

- To update, enter either **Update Phone Numbers** or **Update Email Addresses**.

- You can display all entries from the Ask Oracle bar using the Show command. Just enter **Show Addresses**, **Show Phone Numbers**, and so on.

Primary Phones, Primary Emails, and Primary Addresses

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

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

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

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

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

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

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

Related Topics

- Specify Which Phone, Email, and Street Address is Primary

Specify Which Phone, Email, and Street Address is Primary

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

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

   The application displays the list.

   Here's a screenshot of a list of phone numbers for a contact. You can tell which is primary by a **Yes** in the **Primary** column (callout 1 in the screenshot).
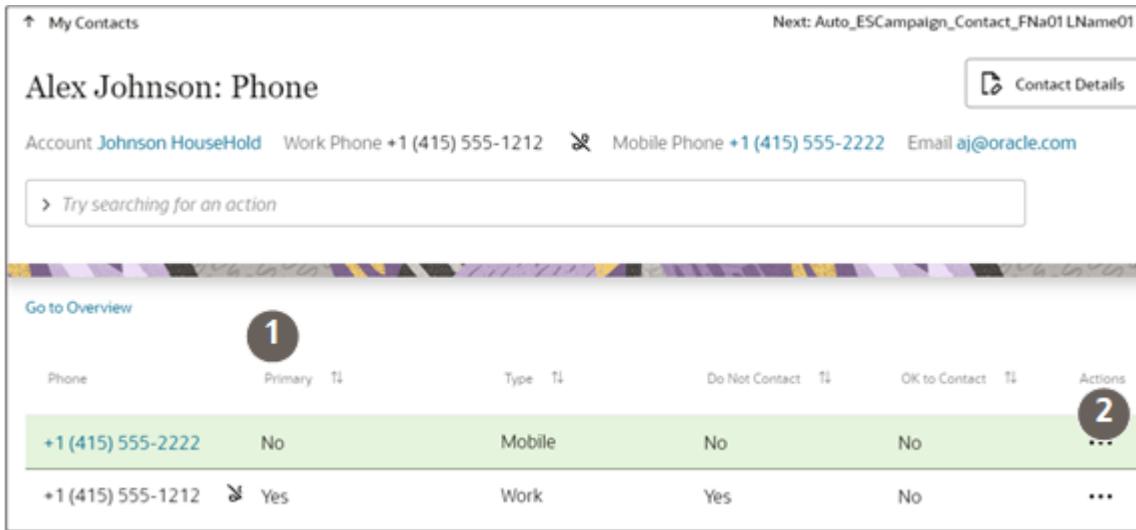
4. Click **Actions** (the three dots highlighted by callout 2) for the number you want to make primary and select **Edit**.
5. On the Edit Phone page, click **Primary**.
6. Click **Save**.

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

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

1. Open the record.

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2. Enter **show** in the Ask Oracle bar and select what you want to see: **Show Phone Numbers**, **Show Email Addresses**, or **Show Addresses**.

3. Press **Return**.

Results:

The application displays the list.

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

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

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

Results:

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

Related Topics
- Verify Phone and Email

Update Phone Numbers, Email Addresses, and Contact Preferences

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

1. Display the contact you want to update.
2. To update the contact's primary phone number or primary email address, including the contact preference, do the following:
   a. In the Ask Oracle bar, enter **Update Phone Number** or **Update Email** .
   b. Make your updates and click **Save**.

3. If you want to update any of the phones or email addresses for a contact: then do the following:

   a. In the Ask Oracle bar, enter **Show Phone Numbers** or **Show Email Addresses**.

   b. Click **Actions** > **Edit** for the phone number or email address you want to update.

   c. Make your updates and click **Save**.

8 Rollups

What are rollups?

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

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

In Sales, the calculated value of a rollup appears in the object detail page. Here's a screenshot of an account in Sales, showing rollup attributes. This screenshot shows the Rollups tab on the left pane and the rollup attributes shown in a table:

> **Note:** The Rollups feature replaces the predefined aggregated fields that were available in previous releases for search criteria for your Workspace summarized data.

The sales application provides these predefined rollups:

Predefined Rollup	Relationship	Rollup Value
Total Number of Employees	Account only	The total number of employees in an account and its hierarchy
Fiscal Year Total Potential Revenue	Account only	The current fiscal year potential revenue from an account and its hierarchy
Decision Maker Contacts	Account to Contact	The total number of decision maker contacts
Total Open Leads	Account to Sales Lead	The total count of the qualified and unqualified open leads of an account and its hierarchy
Total Open Hot Leads	Account to Sales Lead	The total count of the qualified and unqualified hot leads of an account and its hierarchy
Qualified Hot Leads	Account to Sales Lead	The count of leads that are qualified and hot

Qualified Leads	Account to Sales Lead	The count of leads that are qualified
Potential Revenue from Open Leads	Account to Sales Lead	The total potential revenue from open leads
Total Open Critical Service Requests	Account to Service Request	The total count of the open, critical service requests that are in the new, in-progress, or waiting status of an account and its hierarchy
Total Open Service Requests	Account to Service Request	The total count of service requests that are in the open, in-progress, and waiting statuses, associated with an account and its hierarchy
Service Requests Closed in the Past Week	Account to Service Request	The count of Service Requests with the close date failing in the past 7 days
Total Amount from Open Opportunity Quotes and Orders	Account to Quotes and Orders	The sum of amounts from the open and in-progress opportunity quotes and orders of an account and its hierarchy
Total Open Activities	Account to Activity	The total count of open tasks of an account and its hierarchy
Total Potential Revenue from Open Opportunities	Account to Opportunity	The sum of the potential revenue from the open opportunities of an account and its hierarchy
Total Potential Revenue from Won Opportunities	Account to Opportunity	The sum of the potential revenue from the won opportunities of an account and its hierarchy
Total Open Opportunities	Account to Opportunity	The total count of open opportunities of an account and its hierarchy
Total Amount from Closed Opportunity Quotes and Orders	Account to Opportunity	The sum of the amount from the closed and won opportunity quotes and orders of an account and its hierarchy
Next Opportunity Closing Date	Account to Opportunity	The date when the next opportunity is expected to close
Last Call Made	Account to Interaction	The date when your team made a phone call to any of the contacts associated with an account or its hierarchy
Total Calls Made	Account to Interaction	The total number of phone calls made to an account and its hierarchy
Last Email Sent	Account to Interaction	The date when the last email was sent to any of the contacts associated with an account or its hierarchy
Total Emails Sent	Account to Interaction	The total number of emails sent to an account and its hierarchy
Total Touches	Account to Interaction	The total number of calls made or emails sent to an account and its hierarchy
Last Touch	Account to Interaction	The date when an account and its hierarchy were last contacted, either by email or phone

Total Number of Open Leads Associated with a Contact	Contact to Sales Lead	The total number of qualified and unqualified open leads associated with a contact
Total Number of Open Hot Leads Associated with a Contact	Contact to Sales Lead	The total number of qualified and unqualified hot leads associated with a contact
Total Number of Open Opportunities Associated with a Contact	Contact to Opportunity	The total number of open opportunities associated with a contact
Sum of Open Opportunities Revenues Associated with a Contact	Contact to Opportunity	The cumulative total of revenue from the open opportunities associated with a contact
Total Number of Open Service Requests Associated with a Contact	Contact to Service Request	The total number of service requests that are in the open, in progress, or waiting statuses
Total Number of Critical Open Service Requests Associated with a Contact	Contact to Service Request	The total number of service requests in the open, in progress, or waiting statuses, marked as critical
Total Number of Touches with a Contact	Contact to Interaction	The total number of emails sent or calls made to a contact in the last 120 days
Date of Last Touch with a Contact	Contact to Interaction	The date when the last email was sent or call was made to a contact in the last 120 days
Total Number of Calls Made to a Contact	Contact to Interaction	The total number of phone calls made to a contact in the last 120 days
Total Number of Emails Sent to a Contact	Contact to Interaction	The total number of emails sent to a contact in the last 120 days
Last Call Made to a Contact	Contact to Interaction	The date when the last outbound phone call was made to a contact in the last 120 days
Last Email Sent to a Contact	Contact to Interaction	The date when the last email was sent to a contact in the last 120 days
Date of Last Response from a Contact	Contact to Interaction	The date when a last email or call was received from a contact in the last 120 days
Total Number of Responses Received from a Contact	Contact to Interaction	The total number of calls or emails received from a contact in the last 120 days
Total Number of Open Activities for a Contact	Contact to Activity	The cumulative total of: • Tasks that are open and not in completed or canceled status • Recurring or nonrecurring appointments with the current date as the start date • Call reports ending on the current date
Last Touch Date	Sales Lead to Interaction	The date when the last call or email was sent in the context of a lead
Last Call Made	Sales Lead to Interaction	The date when the last call was made in the context of a lead
Total Call Made	Sales Lead to Interaction	The total number of calls made in the context of a lead
Total Emails Sent	Sales Lead to Interaction	The total number of emails sent in the context of a lead
Total Touches	Sales Lead to Interaction	The total number of emails and calls made in the context of a lead

Last Email Sent	Sales Lead to Interaction	The date when the last email was sent in the context of a lead
Total Open Activities	Sales Lead to Interaction	The cumulative total of: • Tasks that are open and not in completed or canceled status • Recurring or nonrecurring appointments with the current date as the start date • Call reports ending on the current date
Total Open Opportunities	Campaign to Opportunity	The total number of open opportunities associated with a campaign
Total Won Opportunities	Campaign to Opportunity	The total number of won opportunities associated with a campaign
Total Revenue from Opportunities	Campaign to Opportunity	The total revenue from the open opportunities associated with a campaign
Total Opportunities	Campaign to Opportunity	The total number of opportunities associated with a campaign
Total Revenue from Open Opportunities	Campaign to Opportunity	The total revenue from the open opportunities associated with a campaign
Total Revenue from Won Opportunities	Campaign to Opportunity	The total revenue from the won opportunities associated with a campaign
Total Converted Leads	Campaign to Sales Lead	The total number of converted leads associated with a campaign
Total Leads	Campaign to Sales Lead	The total number of leads from a campaign
Total Hot Open Leads	Campaign to Sales Lead	The total number of unqualified or qualified leads ranked as hot that are associated with a campaign
Total Open Leads	Campaign to Sales Lead	The total number of unqualified or qualified open leads associated with a campaign
Total Revenue from Open Leads	Campaign to Sales Lead	The total amount from the unqualified and qualified leads associated with a campaign
Total Emails Sent	Opportunity to Interaction	The total number of emails sent in the context of an opportunity
Total Touches	Opportunity to Interaction	The total number of email and calls made in the context of an opportunity
Last Email Sent	Opportunity to Interaction	The date when the last email was sent in the context of an opportunity
Total Calls Made	Opportunity to Interaction	The total number of calls made in the context of an opportunity
Last Call Made	Opportunity to Interaction	The date when the last call was made in the context of an opportunity
Last Touch Date	Opportunity to Interaction	The date when the last call or email sent in the context of an opportunity
Total Open Activities	Opportunity to Activity	The cumulative total of: • Tasks that are open and not in completed or canceled status • Recurring or nonrecurring appointments with the current date as the start date • Call reports ending on the current date

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Search Using Hierarchy Rollups

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

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

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

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

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

- Account A
- Subsidiary 1
- Subsidiary 3

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

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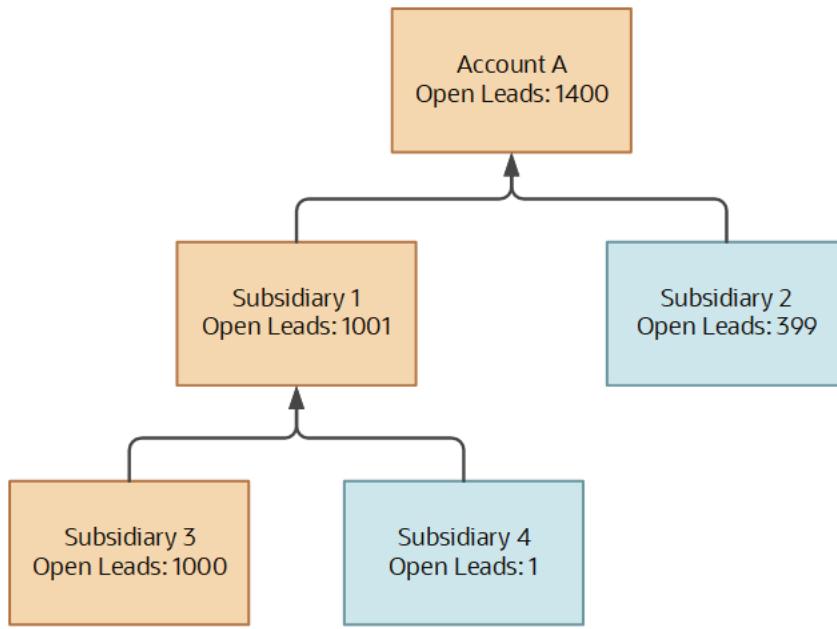
Here's how you search based on the hierarchy data:

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

   You get a list of hierarchy rollup attributes. Hierarchy rollup attributes are all prefixed with the word, Hierarchy.
2. Select a rollup. For example, select **Hierarchy Number of Open Leads**.
3. Select an operator, such as **Greater Than or Equal to**.

   The operators vary based on the rollup you select.
4. Enter a value. For example, `1000`.

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

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

Search for Contacts Using Rollups

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

Here's how you search:

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

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

4. For example, if you select the **Has a Value** operator, you get the list of contacts that match the criteria.

5. Click the contact name to go to its foldout view.

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

Group Your Accounts and Contacts List by Rollup Values

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

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

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

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

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

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9 Quotes and Quote Lines

Quotes

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

From Quotes:

- See the quotes you can access.

- See the quotes list and high-level details.

Quotes You Can Access

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

Switch to the Saved Searches of Quotes

Different saved searches display quotes based on different search criteria. Here's a list:

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

Use the Ask Oracle bar to switch your view to the other saved searches.

You can create your own saved searches as well. See *Saved Searches* in the The Basics chapter to learn more.

The Quotes List and High-Level Details

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

From the list view you can navigate to:

- The quote details in Oracle CPQ - the quoting application.

- The opportunity related to the quote.

- The account related to the quote.

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Quote Details in Oracle CPQ

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

- Review the transaction details.
- Specify pricing.
- Streamline the approvals.
- Generate a proposal.
  See the View Quote Details in Oracle CPQ topic under the Quotes in the opportunity Work Area section to learn more.

View All the Quotes of an Opportunity

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

Click **View All Quotes** in the Quotes panel or search and select **Show Quotes** from the Ask Oracle bar on the Opportunity foldout view.

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

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

Create a Quote

1. Navigate to **Redwood Sales > Opportunities**.
2. On the opportunities list page, use the Ask Oracle bar to search and select **Create Quote**.
   The Oracle CPQ page for creating new quote appears.
3. Enter transaction details.
4. Enter product details.
5. Enter customer details.
6. Enter pricing details.
7. Save your quote.

View the Quote Details in Oracle CPQ

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

In the quote details page:

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

Transaction Details

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

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

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

Pricing

Specify the pricing and discounts. Perform automated pricing calculations.

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

Approvals

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

Generate Proposal

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

Download The Proposal

If you have generated a proposal for a quote, you can download it by clicking on the icon in the **Proposal** column.

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

Manage Actions on a Quote

The table here lists out the actions available for quotes.

Actions	Description
Make Active	This option is available for inactive quotes.

	Only one quote can be active at a time. When you change an inactive quote to active, the existing active quote is deactivated. **Note:** Ensure that you enable the ORA_MOO_REVN_RECONCILE_FROM_SO profile option to reconcile the revenue lines with the new quote lines.
Duplicate	Select this option to create a copy of a quote. Change the quote name and save.
Create Version	Select this option to make changes to a quote and save it as a new version.

Quote Lines You Can Access

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

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

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

You can create your own saved searches as well. See *Saved Searches* in the The Basics chapter to learn more.

The Quote Lines List and High-Level Details

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

From the list view you can navigate to:

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

The Opportunity Details

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

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

The Quote Details in Oracle CPQ

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

- Review the transaction details.

- Specify pricing.

- Streamline the approvals.

- Generate a proposal.

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10 Appointments and Tasks

Overview of Appointments and Tasks

You can create tasks and appointments related to individual accounts, contacts, leads, and opportunities. And you can create stand-alone tasks and appointments.

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

Here are a few things you should know:

- You can create and manage tasks and appointments from the Activities work area or in the context of an individual account, contact, lead, or opportunity.

- While viewing a record, you can view tasks and appointments by entering **show tasks** or **show appointments** in the Ask Oracle bar. You can view the tasks and appointments from any record they're associated with.

- Your pending and overdue tasks are also visible and accessible in the Sales Dashboard.

- Tasks and appointments are listed in activities for all associated records. For example, if you create an appointment for a contact from an account, then that task is visible in both the account list of activities and contact list of activities.

- If you create a task or appointment in a record, it automatically shows up in the list of activities for that record. For example, if you create a task from a lead, it shows up in the Activities list for that lead. If you create the same task from the Activities work area, you must manually associate the lead to the task yourself.

- You can edit the appointment or task from any record where it's visible or from the Activities work area. Editing it in one place is the same as editing it in another.

- While editing an appointment or task, you can attach documents.

- To create a stand-alone task or appointment for yourself and your team without associating it to any record, create it from the Activities work area.

- Stand-alone tasks and appointments are visible only in the Activities work area and in the Sales Dashboard. Only you and other resources you added can see them.

- All salespeople who can access a record, can view the tasks and appointments you associate with that record whether or not you specifically add them as resources. However, only resources you add receive notifications and only the resources and sales administrators can edit the tasks and appointments.

- The salespeople you add as resources, can view appointments and tasks in their My Open Activities list provided by Oracle in the Activities work area.

- The resources you add to a task or appointment get automatically notified using the Notifications (bell icon) feature and email.

- Salespeople added to a task or an appointment can set a reminder before a task is due or before the appointment takes place. Each person can specify if and when they want to be reminded. Reminders come in through the Notifications feature and email.

- You can take actions on a task or an appointment without having to drill into it. For example, you can call a contact on a task by selecting Call. If there's only one contact associated with the task, the call dials directly.

If multiple contacts are associated, you can choose which one to call. Notes you take on the call while it's in progress get saved with the task.

Here are a few things to understand about tasks specifically:

- Typically, it's the owner of the task that's responsible for completing the task and setting its status to Complete. Change the due date of an overdue task to the date you complete it to have the completion date reflected in the task.

- If a task is overdue, then all associated resources see that task on their list of overdue tasks in the Activities work area and in the Sales Dashboard. Your sales administrator can change this default, of course, to just show overdue tasks to the task owner, for example.

- When you create a task, you become its owner automatically. However, you can create a task for someone else by adding a resource and then switching task ownership to that resource. See the topic *Reassign Task Ownership to Someone Else*.

And a few specifics about appointments:

- You can create an appointment for multiple contacts at the same time and invite multiple resources. Each person you add to the appointment is notified. Customer contacts receive automatic email notifications. The salespeople you add as resources to the appointment get invited both through the Notifications feature (the bell icon) and by email.

- Resources can accept or decline the invitation from the appointment itself. Their responses show up next to their names in the appointment.

- There's no group calendar for appointments. Your organization must keep a separate group calendar, so you know who is available when you create an appointment.

Review and Edit Tasks and Appointments in the Activities Work Area

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

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

1. Click **Activities** on the home page.
2. In the Activities landing page, click in the search field and select a saved search as your starting point. Oracle provides you with several predefined saved searches for tasks and appointments.
3. Find the task or appointment in the list generated by the saved search that you selected. You can:
   - Filter the activity by date and other values. For example, here's how to see activities due today:
     i. Enter **date** in the search field.
     ii. Select the **Due Date** filter from the list.
     iii. Select **Today**.
   - Search for the activity in the list by keyword. For example, you can enter the name of the account or contact and press **Return**.
   - Group search results by priority, status, or by contact and other criteria using the **Group By** field.

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- ○ Change what attributes display in search results: Click **More Actions** (the three dots next to the Group By field) and select **Manage Columns**.
- ○ Change the display order of your results using the controls at the top of each column.

4. You can edit appointments and tasks directly from the list by clicking **Action** > **Edit**.

View Tasks or Appointments Within a Record

You view tasks and appointments in any of the records they're associated with by entering **show tasks** or **show appointments** in the Ask Oracle bar.

For example, you can view a task for an opportunity that's associated with a specific contact and account, from the opportunity itself, or from the contact and account. If you can view the record itself, you can also view basic information about tasks and activities for that record, even if you aren't added as a resource. Some details are visible only when you're a resource and have edit access, however.

Set an Appointment or a Task Reminder

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

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

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

Sales Recommendations

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

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

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You can either create the appointment or click **Dismiss** to reject the recommendation and remove it from view. If you accept, the application schedules the appointment with the contact at the time specified in the text. The appointment time reflects your time zone, and the recommendations copy over 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 you get multiple recommendations, you can review them one by one from the Activities panel or from the Activities pages, by clicking the **View Details** link.
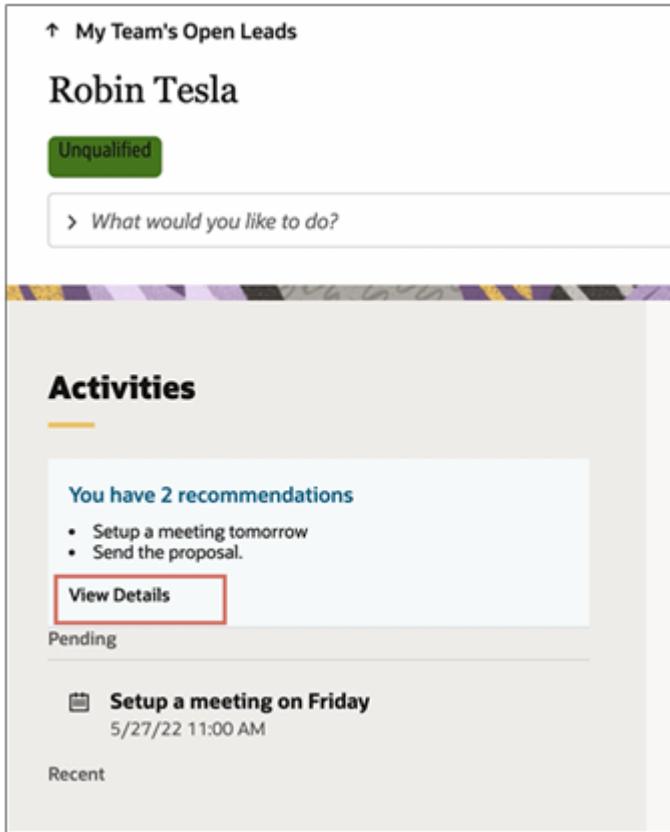
Add and View Attachments for Tasks and Appointments

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

Remove a Completed Task from the Pending List

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

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

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   b. Select the **Complete** status.

   c. Select today's date as the **Due Date**.

3. To mark the task as complete, without changing the date, select **Mark As Complete** the **Actions** menu on the right side of the page.

4. Click **Save**.

Appointments

Create an Appointment

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

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

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

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

   > **Note:** Selecting **Web Conference** as the appointment type schedules a Microsoft Teams, a Zoom, or another type of web conference. For details, see the *Create a Web Conference Appointment* topic.

5. You can receive a reminder using the Notifications feature by selecting a time interval in the **Set Reminder** field.
6. In **Appointment Details**, add the contacts and resources you're inviting.

   > **Note:** The first contact you add to an appointment is marked as the primary contact. After you add more contacts, you can designate a different contact as the primary contact.

7. You can also:

   ○ Add attachments by dragging files to **Drag and Drop**, or click the region to select.

   ○ Set the appointment to show you as busy by making a selection from the **Show Time As** list.

   ○ Make a selection from the **Response** field to indicate if you accept or decline the appointment. Your response is recorded in the list of resources.

   ○ See who else is invited and who has responded and how, by checking the **Appointment Details**.

8. Click **Save**.

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

Create an Appointment from the Activities Work Area

1. Navigate to the Activities work area.
2. Click in the search field and select **Create Appointment**.
3. Select the appointment type and enter the basic details about the appointment.

   > **Note:** Selecting **Web Conference** as the appointment type schedules a Zoom or another type of web conference. For details, see the *Create a Web Conference Appointment* topic.

4. You can add one or more of the following to the appointment: an opportunity, a lead, or an account. Adding a record displays the appointment in the list of activities for that record.
5. You can receive a reminder using the Notifications feature by selecting a time interval in the **Set Reminder** field.
6. Click **Appointment Details** and add any additional contacts and resources. The appointment becomes visible in the list of activities for any contact you add.
7. Click **Save**.

Accept or Decline an Invitation to an Appointment

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

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

1. Click **Actions** > **Edit**. (The Actions menu is the icon with the three vertical dots).
2. Make a selection from the **Response** field to indicate if you accept or decline the appointment. Your response is recorded in the list of resources.
3. Specify when you want to be reminded from the **Set Reminder** list. By default, there's no reminder. Each resource can set their own reminder preference.
4. You can also:

   - Set the appointment to show you as busy by making a selection from the **Show Time As** list.

   - See who else is invited and who has responded and how, by checking the **Appointment Details**.

5. Save.

Related Topics
- Review and Edit Tasks and Appointments in the Activities Work Area

Find Out Who Responded to an Appointment Invitation

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

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

Tasks

Create a Task

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

Creating tasks from a record automatically associates the task with the record where you're creating it. When you create the task in the Activities work area, you can associate it with one or more of the following: an account, an opportunity, a lead, or a contact. The task you create shows up the list of activities for the records you associate. When you create a task, you become its owner. If you want to assign the task to someone else, you must add that person as a resource and then reassign ownership.

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

1. Navigate to the appropriate work area landing page and find the record. You have two options:
   - Create the task from the landing page list: Select the record in the list and click **Actions (three dots)** > **Create Task**.
   - Drill into the individual record overview and enter "create" in the Ask Oracle bar and select the **Create Task** action from there.
2. Enter the basic details about the task.
3. You can receive a reminder using the Notifications feature by selecting a time interval in the **Set Reminder** field.
4. Click **Task Details** and add any additional contacts and resources to the task.

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

5. You can make another resource the owner or remove a resource using the Actions menu (vertical three dots) next to their name.
6. Save your task.
   The task appears on the Activities page and the resources you added are notified. Contacts aren't notified. You can now edit the task:
   - Associate another record. For example, if you created the task for a contact, you can add the account.
   - Add more resources.
   - Reassign ownership.

Create the Task from the Activities Work Area

To create an appointment from the Activities work area list:

1. Navigate to the Activities work area.

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2. Click in the search field and select **Create Task**.
3. Enter the basic details about the task.
4. You can associate the task to an opportunity, a lead, an account, or a contact. The task then appears in the activities for the records you select. If you don't associate the task with any record, then the stand-alone task is visible in the Activities work area and from the Sales Dashboard for the resources associated to it.

   - To associate a lead, opportunity, or account, click in the appropriate field and search for them.

   - To associate the task to a contact, open **Task Details** and add the contact there.

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

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

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

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

Reassign Task Ownership to Someone Else

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

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

1. If you're reassigning a task associated with one or more records, do the following:
   a. Open one of the records associated with the task, such as the contact or the account, and find the task in the Activities page.
   b. Click **Actions** > **Edit**. (The Actions menu is the icon with the three dots).
2. If you're reassigning a stand-alone task, do the following:
   a. Click **Activities** on the home page and open the task. For details, see the topic *Review and Edit Tasks and Appointments in the Activities Work Area*.
   b. Click the task name link to drill down in to the task details.
   c. Click **Actions** > **Edit**.
3. Click **Task Details**.

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

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Send an Email to a Contact

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

1. Open the contact record for the contact you want to email.
2. In the Ask Oracle bar, enter `email` and select **Send Email**.
3. Compose the email. You can add additional recipients and attach documents. Your options differ depending on which one of the email options your organization selected:
   - If you're using Office 365, then you must click **Edit** to edit the draft the application creates for you before composing your email.
   - If you're using the Outlook client or another client, then don't delete the code the application inserts in the body of the email. It's used for tracking the emails and not visible to contacts. Here's an example:

     ```
     ------
     CRM Reference:
     Oracle Digital Sales
     (##0000014003##)
     ```
4. Click **Send**.
5. The application saves the email in the **Activities** panel for the contact. You can read and write any follow-up emails from the same thread. You always see the first line of the latest email in the thread, but you must click it to display the full text.

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

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

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

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

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

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       o Enter `Show` in the Ask Oracle bar and select **Show Contacts**

4. Click on the email address.
5. Compose the email. You can add additional recipients and attach documents. Your options differ depending on which one of the email options your organization selected:

       o If you're using Office 365, then you must click **Edit** to edit the draft the application creates for you before composing your email.

       o If you're using the Outlook client or another client, then don't delete the code the application inserts in the body of the email. It's used for tracking the emails and not visible to contacts. Here's an example:

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

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

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

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

Send or Log an Email Directly from Lists of Activities

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

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

- **Send Email** opens an email compose window addressed to all the contacts associated with the record in the To field. Resources are copied (entered in the CC field).

- **Log an Email** opens a window where you can enter an email that was sent outside the application, so it's available for reference.

Review Email Responses

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

1. You can check the activity stream for replies or open the record and email thread from the notification:

   a. Click the Notifications (bell) icon if you see a number indicating the number of unopened notifications.

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

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

Reply to Emails

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

1. When you receive a notification that a contact replied to your email, click the link to open the record where you sent the email.
2. Alternatively, you can search for record yourself or open the record of the contact who sent reply.
3. In the Ask Oracle bar, enter **Filter** and select **Filter Email Communication** to display only the emails in the list of activities.
4. The reply you received is most likely to be in the first email thread in your list. When a reply arrives in a thread, the number in brackets on the subject line increases, the time stamp reflects time the reply was received, and the thread moves to the front of the activities in the time line.
5. Alternatively, you can search for the email thread by one of the keywords in the subject or text.
6. To view all the emails in the thread, click the subject line. Each email in the thread shows only the first line of the text. You must click the subject line or each email if you want to read the full text.
7. To reply to all recipients, click **Reply All** .
8. For the widest range of send options, click **Actions** (three dots) and select one of the options:

   - Forward
   - Reply
   - Reply All

9. Compose your email and add any attachments and send. You can't save drafts of the email to send later.

Find and Review Emails

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

1. If you know the record from where the original email was sent, then open it. For example, if the email was sent from an opportunity, then open the opportunity.
2. If you don't know the record from where the email was sent, but you know the recipient contact, then open the contact.
3. To find emails in the activity stream, you have different options:

   - You can review all the emails in the activity stream. Just enter "email" in the Ask Oracle bar and select **Filter Email Communication**.
   - You can find specific emails by filtering on a word in the text. Just enter the text in the Ask Oracle bar and select the Filter option. For example, to search for the email with the word "executive", enter the word and select **Filter executive**.

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The search retrieves all items with the text, including notes, calls, tasks, and so on.

- ○ If your search returns too many items, just use the Email Communication and word filters in combination.

Log an Email You Sent or Received Outside the Application

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

Here's how to manually log an email.

1. Display the record where you want to log the email.
2. In the Ask Oracle bar, enter **Log an Email**.
3. In the Log an Email page, enter the required information:
     - ○ Recipients (To, CC, and BCC fields).
     - ○ Subject
4. Enter the email text.
5. Select the date the email was sent or received.
6. In **Email Type**, specify if you're logging an inbound or outbound email.
7. Add any attachments.
8. Save.

Results:

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

Oracle Sales for Outlook

You can handle your email communications with customers directly from Outlook by clicking the **Oracle Sales for Outlook** button on the Home tab ribbon.
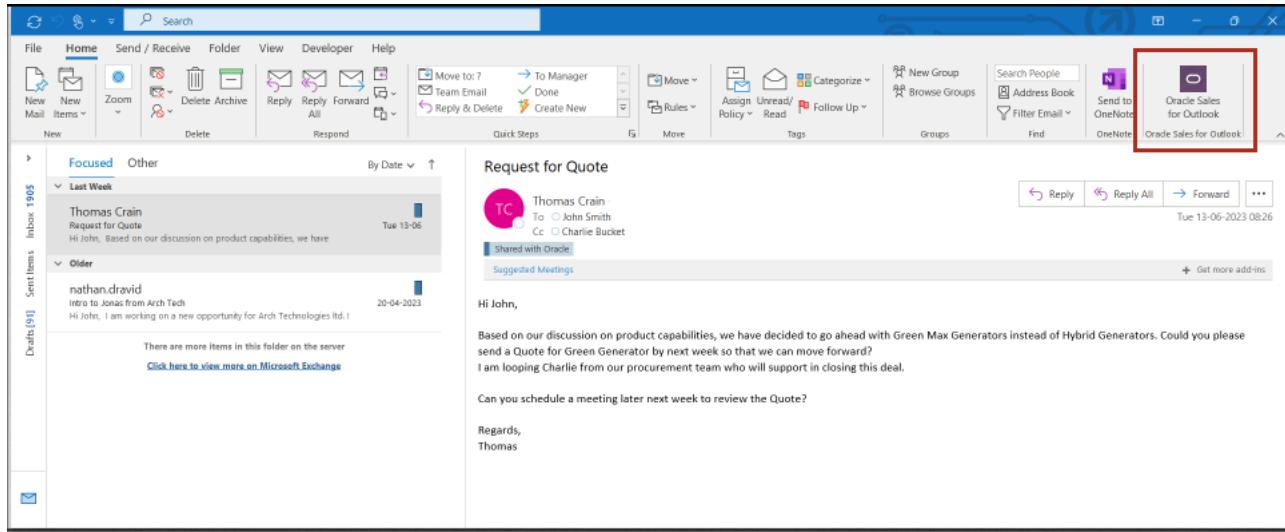
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To learn how to use the add-in, see the topic *Get Started with the Add-In* and related topics in the How do I implement Microsoft 365 for Oracle Sales in the Redwood UX? playbook.

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12 Calls

Make Yourself Available for a Call

Set your presence and availability by doing the following:

1. From the Home page, click any of the tiles, such as Contact, Leads, or Opportunities.
2. Click the **Manage Presence** icon as shown in the following example:
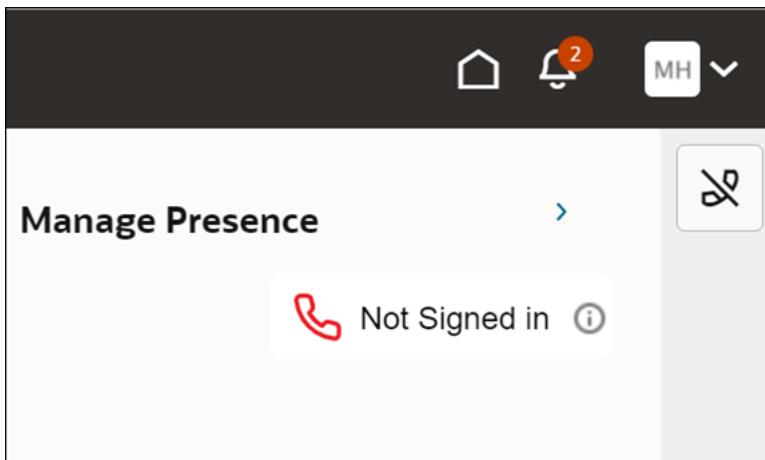
> **Note:** To receive and make calls, you must have at least one of the following privileges: Inside Sales, Sales Manager, or Sales VP.

Place an Outbound Call

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

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

   The Call panel is displayed on the page.

   > **Note:**
   >
   > o If you're using Sales for Redwood, you can also type **Call** in the Ask Oracle bar to initiate the call.
   >
   > o On the Overview page of a contact, account, or lead record, click **View All Service Requests** in the **Service Requests** panel, to view all service requests associated with that record.

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

4. In the **Notes** field, you can take notes and record information while you're engaged in the call.

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

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

   The wrap up section is displayed (only in Service Center).

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

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

7. Click **Save**.

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

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

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

   > **Note:** You can't edit the interactions for calls that were canceled or missed.
   >   - Canceled calls are the calls that you canceled before the customer answered them.
   >   - When it's unknown why a call was missed (for example, canceled, rejected, or abandoned), it's recorded as a missed call.

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

Call a Contact Directly from the List of Activities

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

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

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

Receive an Inbound Call

Here's how you handle incoming calls:

1. Make yourself available for a call.

2. Click **Answer** to accept the incoming call.

   ○ If a single matching record is found for the incoming phone number, then based on the screen pop rules defined:

      - If the caller is a service customer who's calling for a service request, the Overview page of the selected service request record is displayed.
      - If the caller is a contact or lead (if you're using Sales for Redwood), the Overview page of the selected record is displayed.

   ○ If multiple matching records or no matching records are found for the incoming phone number, the Unknown Contact page is displayed.

      - Here, you can either search for an existing contact, or create a new contact.
      - If you're using Sales for Redwood, you can additionally search for an existing lead, or create a new lead.

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

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

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

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

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

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

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

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

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

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

8. Click **Save**.

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

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

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

   > **Note:** You can't edit the interactions for calls that were rejected or abandoned.
   > - ○ Rejected calls are the calls that you declined to answer.
   > - ○ Abandoned calls are the calls where the customer ends the interaction before you accept it.

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

Search for an Existing Contact or Lead from an Incoming Call

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

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

   The Unknown Contact page opens with the unknown number auto-filled in the **Lookup Contacts and Leads** search field (in Sales for Redwood), or the **Lookup Contacts** search field (in Service Center).
2. If the contact is known, but perhaps just calling from a different number, enter the contact's name in the search field.
3. Select the contact name from the results.

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

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

Create a New Contact or Lead from an Unknown Caller

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

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

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

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

   The Unknown Contact page opens with the unknown number auto-filled in the **Lookup Contacts and Leads** search field (in Sales for Redwood), or the **Lookup Contacts** search field (in Service Center).
2. After you've entered the caller's name in the search field and there are no results, you can take notes in the **Notes** field, and end the call. You can also create a new contact or a new lead while you're on the active call, or after you end the call.

   a. To create a contact, click **Create Contact**. The Create Contact page is displayed.
   b. To create a lead (in Sales for Redwood), click **Create Lead**. The Create Lead page is displayed.

    c. In the form, fill out the required information and save the record.

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

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

    d. Click **Save**.

Log a Manual Call

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

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

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

   All incoming and outgoing interactions are recorded in the Activities page of the record on which you are taking the action.
7. To edit the record on the Activities page, hover over it, then click the **Edit** (pencil) icon to edit the notes or change the outcome value from the drop-down list.
8. Click **Save**.

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13 Opportunities

What are opportunities?

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

Guided by the sales method tailored to each sales situation, the opportunity sales team works to close the deal. Your sales organization can create different sales methods for different sales situations. Each sales method can take salespeople through different sales stages and steps.

In addition, administrators can specify a different default win probability percentage for each sales stage. The sales team closes the opportunity when the deal is won or lost. If you lose the deal, the sales organization might require you to enter competitors and the reasons why the deal was lost.

Here are just some data that sales teams can capture for an opportunity:

- Accounts: You can associate an account (for example, a customer or prospect) with an opportunity.

- Opportunity owner: The person who creates an opportunity is automatically assigned ownership. You can change owner if needed.

- Contacts: You can associate contacts with an opportunity. In addition, you can specify a contact's role, affinity, and influence level on an opportunity. A single contact can be marked as primary.

- Currency: The application supports multiple currencies at both the opportunity header and revenue-line levels.

- Budget: Indicates whether the opportunity revenue amount has been budgeted by the customer, and the date that the budget was made available.

- Revenue: You can add products or product groups and amounts to an opportunity, if your administrator has enabled the sales catalog.

- Competitors and partners: You can associate partners and competitors with opportunities.

When salespeople access opportunities, they can quickly view the sales pipeline at a glance from the UI. They can also view Deal Registrations associated with their opportunities by simply entering the smart action **Show Deal Registrations** from the Ask Oracle bar from the Opportunity page.

See the Overview of Opportunity Sales Methods and Stages topic in the Implementation Reference guide for information about sales methods and stages.

Overview of Opportunity Record Details

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

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

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

Opportunity Record Actions

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

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

Access these opportunity record actions from the Ask Oracle bar.

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

Create an Opportunity

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

You can create an opportunity in several ways:

- From the sales dashboard
- From the Opportunities work area
- From an account record
- From a lead conversion

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

Create an Opportunity from the Home Page

1. Click **Create** in the **Ask Oracle** bar on the opportunity landing page.

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2. In the Create Opportunity page, enter the opportunity name in the **Name** field.

   The opportunity name is the only required field when creating an opportunity. The name you enter must be unique for a particular account. You can't have 2 opportunities with exactly the same name on the same account.

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

You can now take any of the available actions on the newly created opportunity. For example, you can click **Opportunity Details** to edit the fields on the opportunity record. You can update other information by entering **Update** or **Add** in the **Ask Oracle** bar and making a selection.

Create an Opportunity from an Account

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

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

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

Create an Opportunity by Converting a Lead

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

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

Add an Attachment to an Opportunity

You can add files and URLs as attachments to opportunities. To view and add attachments, enter **Attach** in the Ask Oracle bar and press **Return**.

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Close an Opportunity

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

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

Closing an Opportunity

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

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

1. Sign in as a salesperson and navigate to **Redwood Sales** > **Opportunities**.

   The opportunity landing page displays the list of your opportunities.
2. Find an opportunity and click **Opportunity Details** to edit it.
3. From the **Status** field, select a status that belongs to a Closed status category. For example, select **Won**.

   The **Close Date** field changes to the current date.

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

   Tip: You can find closed opportunities by searching for them using the Ask Oracle bar.

Use Group By and Custom Aggregations for Opportunities

You can group search results by different opportunity attributes. You can view the number of records in each grouping and search and filter records within these groupings.

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

To learn more about how to use Group by and aggregations, see the topic *Group and Summarize Search Results*.

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View Team and Territories Associated with an Opportunity

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

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

- Image or Initials of the resource

- First and last name

- Email address link which opens your default mail application with the resource email address populated in the **To** field

  If you send an email (via the email link), an entry is automatically recorded in the activity feed for the opportunity. For example, from the Activities panel, you can review email exchanges, notes, call logs, past and future tasks and appointments, as well as recent updates to your opportunity record.

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

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

- City, State, Country (code)

Owner Forecasts

Your quarterly forecast for opportunities you own is available in **Redwood Sales** > **My Forecasts**.

Here's how your forecast is generated:

- The opportunities are placed in a quarter according to their close dates.

- Revenue for opportunities with a win probably between 0% and 39% is unforecasted pipeline.

- Revenue for opportunities with a win probability between 40% and 59% is accumulated in the Best Case category.

- Revenue for opportunities with a win probability between 60% and 99% is in the Committed category.

- Won deals have 100% win probability and are added to the Won revenue.

Forecast Terminology

This table describes some terminology used in forecasting.

Term	Description
Best Case	Sum of all best case revenue values for all forecast items in the forecast period.

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

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

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

Opportunity Revenue Lines

About Sales Catalog

Salespeople enter the products or product groups that customers are interested in purchasing by making a selection from a sales catalog.

They can either browse the catalog or start typing the product name when they make entries in opportunities and leads. The sales catalog consists of a hierarchy of product groups, which classifies and organizes the products in your catalog. Your sales administrator can include a description for each product group and product and can also upload one image for each product.

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

Add Products to an Opportunity

You can add products or product categories to an opportunity in several ways. You can either browser the product catalog and search for your product or if you know the exact name of the product you want to add, then you can quickly add the product from the Add Products foldout subview.

Add Products Using the Foldout Subview

Here's how to quickly add products or product categories to an opportunity from the **Add Products** foldout subview.

1. Open the opportunity you want to update.
2. In the Ask Oracle bar, enter `add` and select **Add Products**.
3. From the **Add Products** foldout subview, enter the product details.

4. Click **Add More** to add more products and when you're done adding and editing the items, click **Save**.

Add Products Using Browse Catalog

Here's how to add products or product categories to an opportunity by browsing the catalog.

1. Open the opportunity you want to update.
2. In the Ask Oracle bar, enter `browse` and select **Browse Catalog**.
3. You can add multiple products or product categories to the opportunity in one of two ways:

   - You can browse the Product Catalog by clicking on product category names. As you browse, you can add multiple items to the lead or opportunity by clicking the plus (+) icon. You can also select from the list of recent items displayed at the end of the page.

     Note: Depending upon how the application is configured, your default view of the products list might be filtered to show only the products or product groups in your assigned territories. If so, you can click the **x** on the Filter by Territory filter to show all products and product groups in the catalog.

   - If you know the name or part of the name of the product or category, enter it in the Ask Oracle bar and press the **Return** key to display product categories and products with that name or part of that name. You can add multiple such filters. And you can start browsing through your search results at any time.

     Note: Ensure that your administrator has enabled the Product and Product Group objects for Adaptive Search and has run a full publish process. While records you create and update in the UI are automatically indexed and made searchable within seconds, imported records or records updated by background processes aren't available for search until the indexing process completes.

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4. As you browse or search, you can add multiple items to the cart by clicking the + (plus) icon.
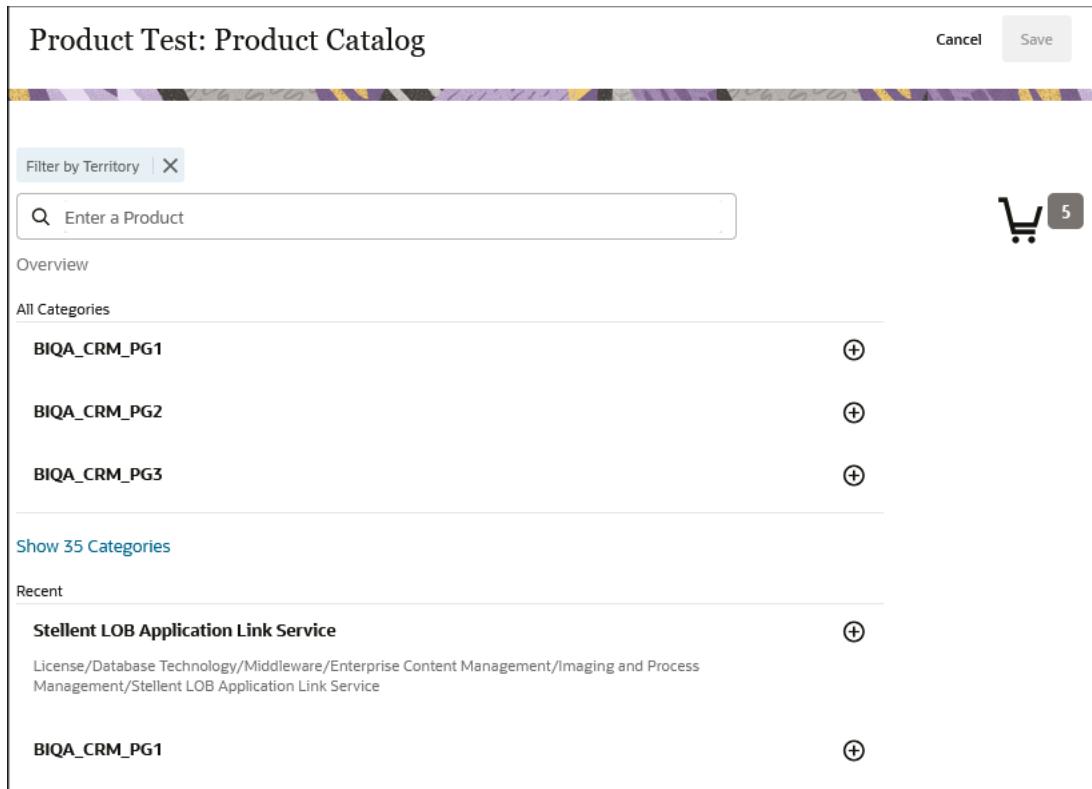
5. Click the cart icon to change add pricing and quantity information, or to delete products and replace them with others:

Product Test: Product Catalog

   ○ To add pricing and quantity information, or to change the product, click **Actions** (the three horizontal dots icon highlighted in the screenshot) and select **Edit**.
   ○ To delete the product, click **Actions** and select **Delete**.
6. When you're done adding and editing the items, click **Save**.

View and Assign Sales Credits to Revenue Lines and Split Credit

Sales credit recipients and revenue amounts roll up the resource hierarchy for pipeline reporting and quota attainment.

You assign sales credits to sales resources (salespeople or other sales users) while editing product lines in opportunities. When a product line is first added to an opportunity, the application sets the user who added it as the sole sales credit recipient. This means that the sole recipient receives 100 percent of the sales credit.

View Who Gets Credits for Revenue Lines

There are two types of sales credit: Revenue sales credit is allocated to salespeople working the deal, while overlay sales credit, also known as nonrevenue sales credit, is split and allocated to other resources helping out with the deal, such as a product or market specialist. You can find out who is getting credit for revenue lines by clicking the Sales Credit (the person icon) in a revenue line.

Assign Sales Credits to Revenue Lines

You can allocate and manage sales credit amounts that opportunity team members receive.

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Here's how to add or edit the Revenue Credit and Overlay Credit receivers and assign percentage sales credit:

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

   The opportunity landing page displays the list of your opportunities.
2. Select the opportunity you want and, from the **Products** pane, click the **View all Products** link to go to the Products page.
3. Click the Sales Credit icon to assign or modify percentage sales credits to new or existing Revenue Credit and Overlay Credit receivers.
4. Click the **Revenue Credit** and **Overlay Credit** tabs to add or edit a revenue or an overlay credit (split credit) receiver.
5. Once you're done modifying the sales credit details, click **Save** (check mark icon) on the revenue line (row) to save your changes.
6. Click **Done** when finished adding your sales credits.

About Recurring Revenue Schedules

Opportunities support a product revenue model that features revenue-based forecasting, products and product groups, recurring revenue, and revenue data captured at the line level.

For example, recurring schedules in opportunities let you enter and track opportunity products or product groups that are part of a subscription business model. The subscription business model applies to the sale of goods, software, or services where the customer is required to pay a subscription price for access to the goods, software, or services, with additional usage or pay-as-you go charges in some cases.

> **Note:** Recurring opportunities functionality is available only if your administrator has enabled it.

Create and View Revenue Schedules on a Revenue Line

You use recurring transactions to enter and track opportunity products or product groups that are part of a subscription business model.

Here's how to create a recurring revenue schedule for a product or product group in the opportunities UI.

1. Navigate to **Redwood Sales** > **Opportunities**.
2. Edit an opportunity by clicking the name in the list. Or, create an opportunity and save and edit it.

3. In the Edit Products page, enter the details about the product or product group.
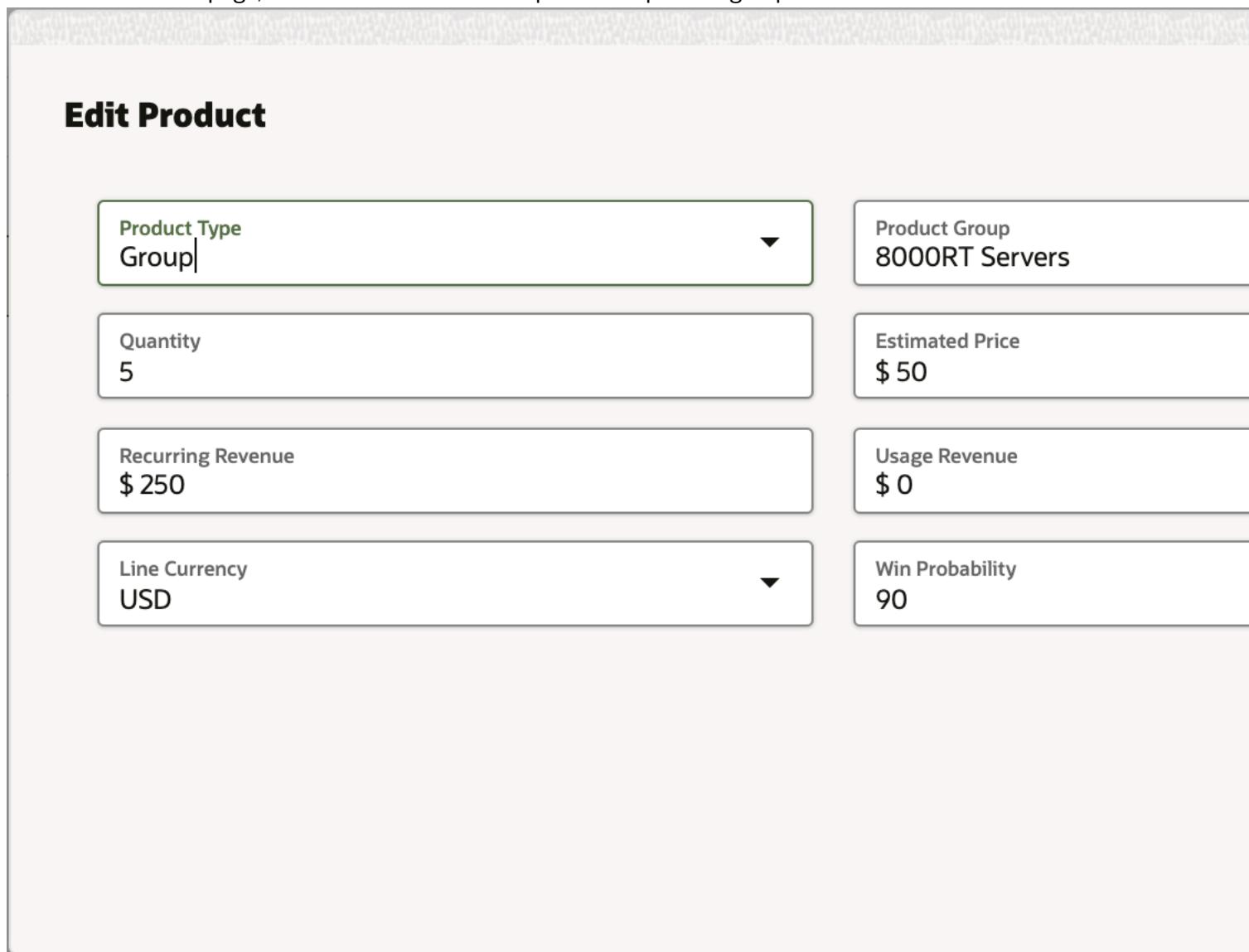
Edit Product

Product Type		Product Group
Group	▼	8000RT Servers

Quantity	Estimated Price
5	$ 50

Recurring Revenue	Usage Revenue
$ 250	$ 0

Line Currency		Win Probability
USD	▼	90

4. Enter the data into the fields, using the guidance in this table.

Depending upon how your application is configured, you may have additional product line attributes available.

Field	Guidance
Price Type	Enter a category that describes the price, such as recurring, nonrecurring, or usage revenue.
Quantity	Enter quantity of the product or product group being sold, as a whole number.
Estimated Price	Enter the amount of the product or product group being sold.
Recurring Revenue	Enter the recurring revenue for the revenue line.
Nonrecurring Revenue	Enter the non-recurring revenue for the revenue line.
Usage Revenue	Enter the usage revenue for the revenue line.

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Field	Guidance
Amount	Amount used in forecasting and for reporting. The application calculates this field by adding recurring, nonrecurring, or usage revenue totals.
Line Currency	The initial value is based on the opportunity-level currency. If multiple currencies are implemented, you can pick a different currency.
Win Probability	The initial value is the opportunity-level win probability.
Close Date	Indicates the expected close date of the product line. The initial value is the opportunity-level close date, but each line can have its own close date

5. Click **Add Schedule**, and the Schedule section displays. Here's a sample screen shot:

6. Enter the required data into the fields, using the guidance in this table:

Field	Guidance
Frequency	Select a frequency that the revenue should be generated for. Note that: o Bi-Weekly is twice a month (every two weeks)

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Field	Guidance
	o Bi-Monthly is every other month
Divide Amount by Transactions	Select this check box if you want the amounts to be divided by the number of transactions based on the set schedule.
Start Date	o The default date is opportunity close date. o You can update the field to any other value (equal to or later than current date).
End By	Enter either the number of transactions or a calendar end date, depending on what radio button you selected. **Note:** The number of transactions to include in your recurring revenue schedule for a product or product group should not exceed 500.

7. Click **Generate Schedule**.

The appropriate number of transactions is created based on frequency, start date, and number of transactions or end date.

- o The close date on each transaction is set to a value derived from the combination of frequency, start date, and end date.
- o Quantity and amount are repeated for each transaction.
- o Other values (like status, win probability, product, currency, and so on) are cascaded from the parent revenue line.
- o Transactions are ordered by ascending close date, by default.
- o Total quantity and amount are displayed for the schedule. Total amount shows the applicable currency symbol of the product currency.

8. Review the transactions in the schedule and adjust if required.

For procedures on managing recurring opportunity products or product groups that are part of a subscription business model, see the related topics.

Related Topics
- Overview of Recurring Opportunity Products
- Create and Maintain Recurring Opportunity Products
- Manage Opportunity Products and Revenue

How can I see who's receiving sales credit for my opportunity?

If your sales administrator has enabled the credit receiver record set of values, then you can find out who is receiving sales credits from the Revenue Lines list view page. You can search opportunity records using the **I or my subordinate am a credit receiver** and **I am a credit receiver** record set values.

These record sets are predefined but they must be enabled before you can use them in Sales for Redwood.

- **I or my subordinate am a credit receiver** returns records where the signed in resource or their subordinate is a credit receiver for the opportunity.

  This allows sales managers and sales VPs to view the revenue lines for their entire team and see who's receiving credit.

- **I am a credit receiver** returns records where the signed in resource is a credit receiver for the opportunity.

Note: Keep in mind the following prerequisites to assign sales credits in opportunities:
- Territories have been set up and your company is using territories for assignment of opportunity products.

- You must have Full access to the opportunity to assign sales credits.

Related Topics
- Enable Credit Receiver Record Set Values

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About Web Conferences

If your organization has enabled Microsoft Teams or Zoom, then you can start or schedule web conference meetings from within your sales application.

You can:

- Schedule a web conference for an account, a contact, a lead, or an opportunity
- Add multiple contacts and resources to the web conference
- Start a scheduled web conference meeting by selecting the **Start meeting** in an appointment listed in the list of activities
- View web conference interactions as part of the activity stream of the respective objects such as account, contact, lead, and opportunity

Create a Web Conference Appointment

Here's how to create and schedule a web conference meeting from the Create an Appointment page.

1. Navigate to the appropriate work area for the object you want.
2. In the landing page, find the account that you want in the list and select **Create Appointment** from the **Actions** menu.

   > **Note:** While you're viewing an individual record, you can instead enter "create" in the Ask Oracle bar and select the Create Appointment action from there.

3. Enter the basic details about the appointment and in the **Type** field, select **Web Conference**.
4. Expand **Appointment Details** and add the contacts and resources you want to add as participants to the web conference appointment.

   > **Note:** The first contact you add to an appointment is marked as the primary contact. After you add more contacts, you can designate a different contact as the primary contact.

   The primary contact on the record and the owner of the record are invited automatically in addition to any other contacts you added.

5. Click **Save**.

   If web conferencing is enabled, a meeting is created and the meetings details, meeting ID, and URL is automatically displayed on the appointment details area. In addition, the web conference appointment displays as pending on the activities list for your account, contact, lead, or opportunity.

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Manage My Web Conference

Here's how you can edit and delete web conference appointments. For example, you might want to add or remove participants, change the scheduled date and time, or modify the meeting contents.

Edit Web Conference Details

Here's how to edit the details of a pending web conference meeting.

1. From the Activities page, select the meeting that you want to update.
2. Click **Actions > Edit** (the Actions menu is the icon with the three vertical dots).
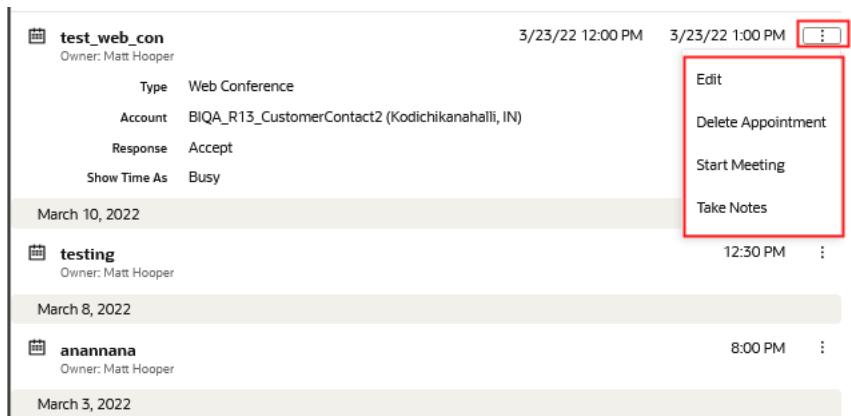
3. Make your changes and click **Save** when done.

   Only changes to the appointment owner, time, and subject are updated on the corresponding web conference meeting.

Add or Remove Web Conference Participants

When you create a web conference type appointment, the Primary email address is used for both contacts and resources (sales team members). You can add additional contacts and resources when initially creating your web conference or you can add or remove them from your pending web conference. You can also change a contact and mark a different contact as a primary contact. Likewise, you can add resources to the web conference and mark as owner.

Here are the steps to add or remove participants to your web conference.

1. From the Activities page, select the web conference appointment that you want to modify.
2. Click **Actions > Edit** and expand the **Appointment Details** section.

3. From the **Contact – Actions** menu (the Contact-Actions menu is the icon with the three horizontal dots), you can select from the following contact lists:
   - All Contacts
   - My Business Contacts
   - My Contacts

   The following are automatically included as participants.
   - Primary contact of the Lead, Opportunity, Account, or the Contact's primary email address
   - Owner of the Lead, Opportunity, Account, or Contact if different from the signed in user

4. Select additional contacts that you want to participate in or remove from the web conference. You can also choose to mark a contact as your primary contact.
5. Next, select any additional resources that you want to include, remove, or change.
6. Click **Save**.

> **Note:** If you have enabled the setting to send a meeting invite via email, the web conference meeting URL link and invite details are sent to all invitees. You can add invitees (participants) while scheduling a web conference meeting. You can also invite additional participants while the meeting is ongoing.

Delete a Web Conference

You can delete a web conference appointment that hasn't yet started. You can also delete a web conference meeting that has already started but a warning dialog is display for you to confirm that you want to delete the appointment.

1. From the Activities page, select the web conference meeting that you want to delete.
2. Click **Actions > Delete Appointment** to remove the corresponding web conference meeting.

Start a Web Conference

If you have access to the Account, you can view all feed items (pending, ongoing, or completed meetings) and can both start or join a web conference. Here's how.

1. Locate and select the Web Conference appointment in the Activities page.
2. Click **Actions > Start Meeting** to start the corresponding web conference meeting.

If you are the meeting host, then you should receive a notification that participants have joined the web conference and are waiting for the host to join. This depends on what interested events you subscribed to receive Webhook notifications for your app during setup.

> **Note:** If the web conference unexpectedly ends or the call drops for some reason, then you can start the meeting again from the Activities area of your sales application.

Once the meeting host has started the meeting, anyone who has access to the web conference appointment record can click **Join** to attend the web conference.

Add Notes During an Ongoing Web Conference

The user hosting the meeting or any participant who has joined a meeting can add notes such as meeting minutes to the web conferencing meeting or add action items while the meeting is in progress.

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Here's how.

1. Locate and select the Web Conference appointment in the Activities page.
2. Click **Take Notes** and a communications panel as shown opens to the right of your screen.

   Note: The communications panel lets you and other participants take notes about the on-going web conference. The panel remains in place while you continue to perform other tasks and remains open after your web conference ends.
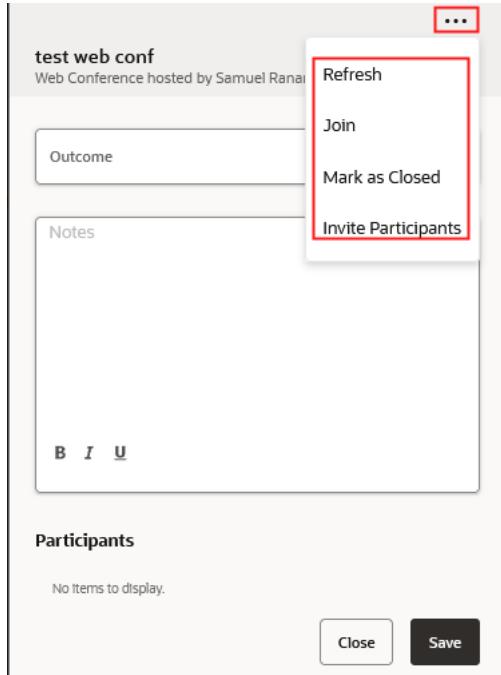
Note: If you are the meeting host and if you started the meeting from your web conference provider, such as Zoom, and then later open the parent record, you can either click the communications panel header or click the expand icon to open a different panel to takes notes for your meeting.

Once other participants join, they can also add notes so ensure that you click **Save** after entering some notes periodically. Click **Refresh** to ensure you're viewing or editing the latest version of the meeting notes.

Invite Participants

Once you have started the meeting for all participants, you can invite additional participants while the meeting is ongoing.

1. From the communications panel, click the Actions menu (3 horizontal dots icon) and select **Invite Participants**

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2. Add the participants you want to invite to the ongoing web conference as follows:

test web conf
Web Conference hosted by Samuel Ranard

Invite Participants

Participants:
julian

Julian Morris <sendmail-test-discard@oracle.com>

Cancel   **Invite**
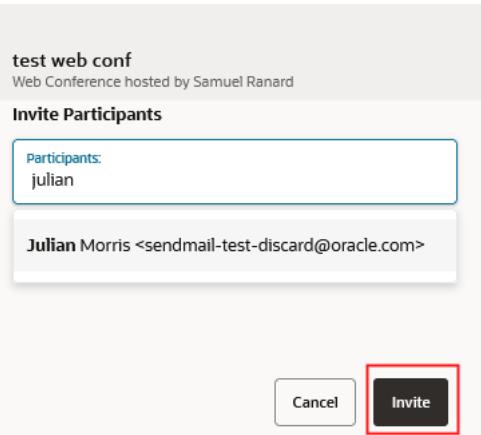
3. Click **Invite**.

Wrap Up a Web Conference

Here are the steps to wrap up and give an outcome of your web conference.

1. Insert the final comments agreed at the meeting in the communications panel.
2. Select an outcome from the **Outcome** drop-down list. You can select from one of the following outcomes:
   - Left message
   - Positive outcome
   - Provided information
   - Answered question
   - Call answered
   - Known issue
   - Documentation issue
   - At risk
3. Click **Save**.
4. Click **Mark as Closed** to set the interaction status to closed.

   Note: You can click **Close** to dismiss the communications panel at any stage. You can reinstate the panel by expanding an ongoing communications panel or performing the **Take Notes** or **Start Meeting** actions.

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