Oracle Fusion Cloud Sales Automation

Implementing Oracle Partner Finder

Oracle Fusion Cloud Sales Automation
Implementing Oracle Partner Finder

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1 About This Guide

Audience and Scope

This guide outlines how to enable your own custom Partner Finder using a predefined template, in just a few quick steps. Your Partner Finder works on top of Oracle Partner Relationship Management in Oracle CX Sales.

To set up and work with the additional features of Oracle CX Sales, see Oracle CX Sales documentation on Oracle Help Center at https://docs.oracle.com.

This implementation guide is designed to be used as a starting point that shows how you can use Oracle Visual Builder to develop and implement your own Partner Finder that supports your unique business requirements.

Related Guides

To understand more about the information covered in this guide, refer to the list of guides in the following table.

| Title	Description
Developing Applications with Oracle Visual Builder	Describes how to use a web-based visual development tool to create and publish custom web and mobile applications that can integrate business objects and applications REST services to extend SaaS services.
Administering Oracle Visual Builder	Describes tasks for administrators of Oracle Visual Builder.
Implementing Sales	Contains conceptual information and procedures needed to implement components and features.
Securing Sales and Fusion Service	Contains information to help setup users and sales administrators configure access to functionality and data.
Security Reference for Sales and Fusion Service	Lists the predefined security data that's included in the offering.
Getting Started with Your Partner Relationship Management Implementation	Describes the concepts and procedures necessary to configure your implementation for channel sales.

Related Topics
- Oracle Help Center

2 About Oracle Partner Finder
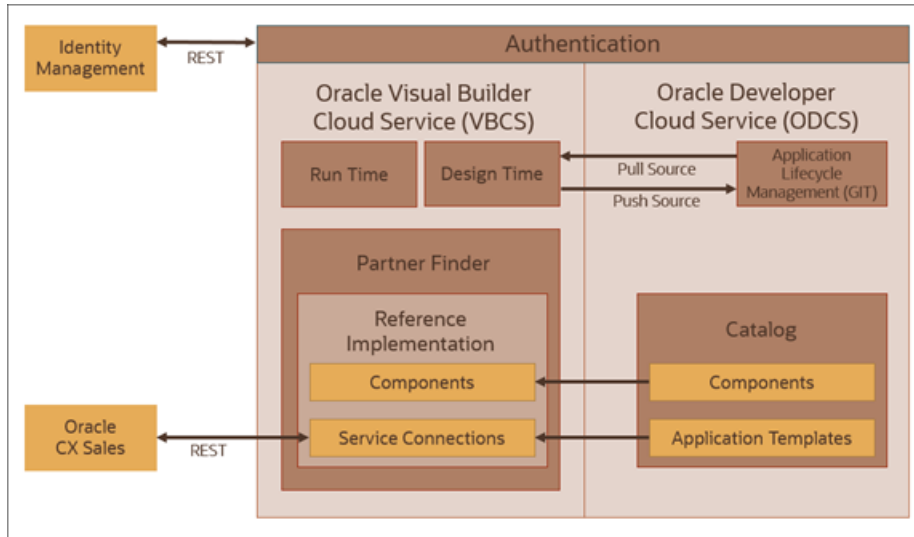
Overview of Oracle Partner Finder

Oracle Partner Finder is an offering within Oracle CX Sales that lets anonymous users explore your partner network. Once a user finds a partner who looks promising, they can fill out an inquiry form asking for a response from that partner.

Here's an example of the Partner Finder search results page.
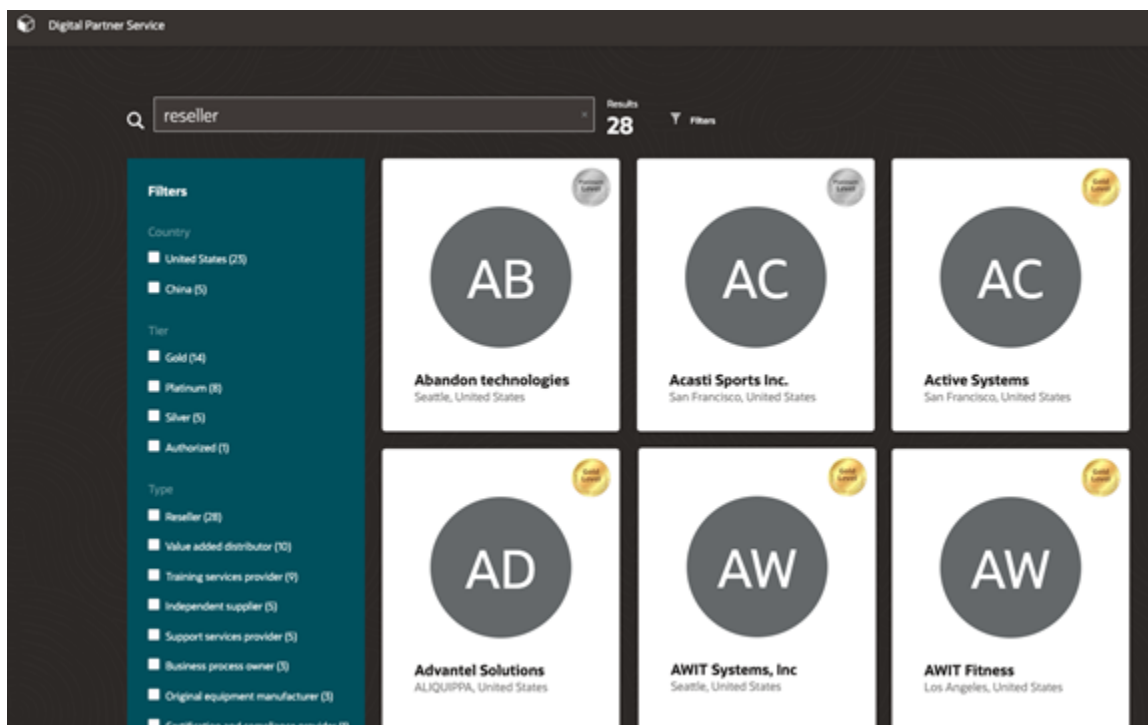
Your Partner Finder application is configurable to meet your business needs. For example, configure the Partner Finder application user interface to reflect a company brand or add custom search filters. Using Oracle Visual Builder, you define root pages and styles, and include various UI components, depending on what you need. Once configured and deployed, users can access the Partner Finder application UI without signing in to explore and contact partners within your network.

The following figure provides a general overview of the Partner Finder architecture, including its relationship with Oracle Developer Cloud Service and Oracle Visual Builder Cloud Service.

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Related Topics

Oracle Partner Finder Terminology

Here's an overview of some Oracle Partner Finder terminology.

- **Oracle Visual Builder**: A cloud-based software development Platform as a Service (PaaS) and a hosted environment for your application development infrastructure. It provides an open-source, standards-based solution to develop, collaborate on, and deploy applications within Oracle Cloud.

- **Partner Finder Application**: The application that you build using Oracle Visual Builder that acts as the web interface for your users. The Partner Finder application is built using the Partner Finder template.

- **Partner Finder Users**: Visitors who use the Partner Finder application. These visitors are anonymous and don't have any associated user accounts.

- **Partner Finder Template**: A template with several pages, including the partner search and filter, a partner details view, and a partner inquiry page. You use this template to implement a Partner Finder application.

- **Adaptive Search:** Adaptive Search is an improved search capability that CX Sales offers for all key objects.

Related Topics
- Developing Applications with Oracle Visual Builder

Technical Compatibility

This topic describes the software versions that are compatible with this release of the Partner Finder.

Use the following software and specified versions with this Partner Finder release:
- Oracle Partner Finder is supported with Oracle CX Sales 20B, or later.

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You must have one of the below licenses:

- o Oracle CX Sales and Fusion Service - Enterprise
- o Oracle CX Sales and Fusion Service - Premium

> **Note:** Partner Finder uses CX Sales REST APIs through Oracle Visual Builder. For more information, refer to the Oracle REST API for CX Sales reference in the Related Topics.

- Oracle Visual Builder 19.4.3.0, or later.
- Oracle JavaScript Extension Toolkit (Oracle JET). Oracle Visual Builder includes Oracle JET bundled in with it and updates the version to uptake new features periodically. Oracle Partner Finder is compatible with the Oracle JET versions bundled with the corresponding versions of Visual Builder.
- Browsers supported by Oracle Visual Builder are listed in the Supported Browser topic in the Oracle Cloud Known Issues for Oracle Visual Builder. See the Related Topics that follow.

Determine the Version of Oracle CX Sales

To determine the version of CX Sales that you have installed:

1. Sign in to CX Sales.
2. Select the menu next to the name of the signed-in user.

   The **Settings and Actions** menu appears.
3. Click **About This Application**.

   The **About This Application** dialog box is displayed. The version number appears after the word **Revision**.

Related Topics
- Known Issues for Oracle Visual Builder
- Determine Component Versions

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3 Mandatory Setup Tasks

Overview of Mandatory Setup Tasks

Here are the mandatory tasks that are covered sequentially in this chapter. You can use these steps, like a checklist, to get your Partner Finder application set up.

1. Set up CX Sales

    a. Set up the APPID User

       This allows users to search the Partner Finder application without logging in.
    b. Set up adaptive search

       Adaptive search provides an efficient search and filtering capability in your Partner Finder application.
2. Set up Oracle Visual Builder

    a. Configure Oracle Visual Builder with CX Sales
    b. Configure Oracle Visual Builder with Oracle Component Exchange
    c. Create a new Partner Finder application
    d. Verify your Oracle Visual Builder settings
    e. Set up authentication for your application
    f. (Optional) Configure Git for application source control

Set Up CX Sales

Set Up the APPID User

Use this topic to set up the APPID user for your Partner Finder application. The APPID user is required in situations where anonymous users need to access services from Oracle CX Sales, such as REST APIs that are restricted.

The APPID user is required for searching and viewing partner details and creating partner inquiries.

To set up the APPID user, you must:

1. Create the Partner Finder APPID role.

    > **Note:** You can use any custom role name and role code.

2. Create the APPID user, and assign the newly created role to that user.

> **Note:** For testing purposes, you can optionally use any existing CX Sales user who has access to search for partners in the Workspace UI, view partner details, and create leads. But, before going live with your Partner Finder application, complete the steps in this topic to ensure that the APPID user has the minimum privileges required.

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1. Create the Role for the APPID User

You must create a job role with required privileges for the Partner Finder and then grant it to the new APPID user. Use this task to ensure that the APPID user doesn't have more privileges than required.

Once you complete this task, you must complete the next task, Create the APPID User, to create the APPID user and assign the newly created role to that user.

To create the role for the APPID user:

1. Sign in to Oracle CX Sales.
2. Navigate to the **Security Console** work area and click the **Roles** tab.
3. Click **Create Role**.
4. In the **Role Name** field, enter a name for the role.

   > **Note:** You can use any custom role name and role code. Just be sure to assign this role to the APPID user that you create, described in the next section.

5. In the **Role Code** field, enter a code.
6. From **Role Category** list, select **CRM - Job Roles**.
7. Click the **Next** .
8. Click the **Privileges** tab.
9. Click **Add Function Security Policy**.

   The **Add Function Security Policy** dialog appears.
10. In the **Search** field, enter each of the following security policies, then click **Add Privilege to Role**:
    - View Partner (ZPM_VIEW_PARTNER_PRIV)
    - View Partner Profile (ZPM_VIEW_PARTNER_PROFILE_PRIV)
    - Create Sales Lead (MKL_CREATE_SALES_LEAD_PRIV)
11. Click **Cancel** to close the **Add Function Security Policy** dialog box.
12. On the **Function Security Policies** page, verify that the privileges that you added are listed, then click **Next**.
13. Create the **View All Partners** security policy:
    a. Click **Create Data Security Policy**.

       The **Create Data Security Policy**. dialog appears.
    b. In the **Policy Name** field, enter the following text:

       `View All Partners`
    c. In the **Database Resource** field, search for and click the following resource, then click **OK**:

       `Trading Community Party`
    d. In the **Data Set** list, select **Select by instance set**.

       From the list of instance sets, select **Access the trading community organization for table HZ_PARTIES for all organizations in the enterprise with usage partner**.
    e. In the **Actions** list, select the following options:
       - **Read**
       - **View Partner Organization**
       - **View Partner**

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      f. Click **OK**.
14. Click the **Summary** step.
15. Click **Save and Close**.

    A dialog appears, confirming the role changes.
16. Click **OK**.

2. Create the APPID User

Once you have created the role for the APPID user, you must create the APPID user, and assign the role to the user.

To create the APPID user:

1. Sign in to Oracle CX Sales.
2. Navigate to the **Security Console** work area and click the **Users** tab.
3. Click **Add User Account**.
4. Enter the values in the required fields.
5. Click **Add Role**.

    The **Add Role Membership** dialog appears.
6. Search for and click on the the role you created in Step 1.

> **Note:** You created this role in the previous section, Create the Role for APPID User. If you used your own custom role name when creating the role, then search for and select that role name.

7. Click **Add Role Membership**.

    A confirmation dialog appears.
8. Click **OK**.
9. Complete the same steps 6-8 for these additional roles. These roles are required to create leads from partner inquiries:

    ◦ Resource (ORA_HZ_RESOURCE_ABSTRACT)

    ◦ Employee (ORA_PER_EMPLOYEE_ABSTRACT)

10. Click **Done**.
11. Click **Save and Close**.

> **Note:** If you want the Partner Finder application to create leads from partner inquiries, then you must also do the following:
> 1. In CX Sales, navigate to Users and Roles > Create User to create a new user and associate it with a business unit.
> 2. On the Create User page, link the new user to the user account that you just created above in the Create the APPID User procedure (steps 3 and 4).
>
> Alternatively, if you first create the user (and associate it with a business unit) using the Create User page, then you can skip the steps listed above in the Create the APPID User procedure. Just be sure to navigate to the Security Console and associate the user with the Partner Finder APPID role that you created in the Create the Role for the APPID User procedure.

You can create APPID users to have a different password expiry policy. Doing so ensures that the regular password expiry rules don't apply to APPID users. To do this, you can create a different user category for the APPID users.

To create a category for the APPID user a with a different password expiry policy:

1. Sign in to Oracle CX Sales.
2. Navigate to the **Security Console** work area and click the **User Categories** tab.
3. Click **Create**.

   The **User Category: Details** page appears.
4. Click **Edit**.
5. Enter a name in the **User Category Field**.
6. Click **Save and Close**.
7. Click **Password Policy**.
8. Click **Edit**.
9. Configure the fields for the APPID user password expiry policy.
10. Click **Save and Close**.

Set Up Adaptive Search

The Partner Finder application uses the Adaptive Search functionality through REST API to provide an efficient search and filter capability.

Enable Adaptive Search

First, you must enable Adaptive Search. Next, you must enable the Partner object for Adaptive Search. If you have already done this, then you can skip straight to configuring your display, search, and filter attributes.

For more information, see the Enable Workspace and Other Features That Use Adaptive Search topic in the Implementing Sales documentation.

Configure Display, Search and Filter Attributes

To run the default Partner Finder, configure the display, search, and filter attributes in Adaptive Search.

1. Display attributes are shown in the Partner Card in the Partner Finder Search Results page.
2. Search attributes can be used to search for a partner in the Partner Finder page.
3. Filter attributes can be used to filter the partners in the Partner Finder Search Results page.

For more information about configuring these attributes, see the Search Setup section of the Adaptive Search and Workspace chapter in the Implementing Sales documentation.

Use the below table as reference to make the required configurations for these Adaptive Search settings:

- **Enable:** You must enable an attribute if you want that attribute to be available in the partner search, filter, or results card.
- **Analyzed Text Search:** This is required to enable attributes to be searched as individual words during partner search.
- **Include in Keyword Search**: This is required for attributes to be enabled for partner search.

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Functional Name	Object/Attribute Name	Enable (Adaptive Search Configuration)	Analyzed Text Search (Adaptive Search Configuration)	Include in Keyword Search (Adaptive Search Configuration)
Partner Name	Partner/Organization Name	Yes	Yes	Yes
Partner Number	Partner/Partner Number	Yes	Not applicable	Not applicable
Partner Status	Partner/Status	Yes	Not applicable	Not applicable
Partner Tier	Partner/Tier	Yes	Not applicable	Not applicable
Partner Type	Partner/Partner Types	Yes	Yes	Yes
Partner Type	Partner/Partner Types/ Partner Type	Yes	Yes	Yes
Partner Country	Partner/Primary Address	Yes	Yes	Yes
Partner Country	Partner/Primary Address / Address/Country	Yes	Yes	Yes
Partner City	Partner/Primary Address	Yes	Not applicable	Not applicable
Partner City	Partner/Primary Address / Address/City	Yes	Not applicable	Not applicable
Partner Location	Partner/Primary Address	Yes	Yes	Yes
Partner Location	Partner/Primary Address / Address/Address	Yes	Yes	Yes

Test Your Search Settings

After configuring the display, search, and filter attributes, you can test your adaptive search setup in the Oracle CX Sales Workspace UI by searching for partners.

Related Topics

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Set Up Oracle Visual Builder

Configure Oracle Visual Builder with Oracle CX Sales

This topic describes how to retrieve the Oracle Visual Builder designer URL and also how to specify the CX Sales details in Oracle Visual Builder.

Retrieve the Oracle Visual Builder Designer URL

You will need to be able to access Oracle Visual Builder in the tasks in this section, as well as many other topics in this document. This task describes how you locate the Oracle Visual Builder Designer URL in your CX Sales deployment. This URL is the one that you will need whenever you want to access Oracle Visual Builder.

Tip: You should bookmark this Oracle Visual Builder URL for all future Oracle Visual Builder sign-ins.

To retrieve the Oracle Visual Builder designer URL:

1. Sign in to CX Sales as an administrator or a setup user.
2. In the **Setup and Maintenance** work area, click the **Task** menu, and select **Review Topology**.
3. Click the **Diagnostic Tests** tab.
4. Click the **Enterprise Application Configuration** sub-tab.
5. In the **Enterprise Application** text box, search for the following string:

   `Oracle Hybrid`

6. Press the **Enter** key.

   The **Search and Select: Enterprise Application** dialog box appears.
7. Click **Oracle Hybrid VBCS**.
8. Click **OK**.
9. Click **Validate External Enterprise Application Endpoint URL**.
10. Click the **Run** icon next to **Validate External Enterprise Application Endpoint URL**.
11. Take note the value in the **External Endpoint URL** field.

    Note: This is the URL that you will need to use every time you want to access Oracle Visual Builder.

Specify the CX Sales Details in Oracle Visual Builder

To specify CX Sales details in Oracle Visual Builder:

1. Sign into Oracle Visual Builder as an administrator.

   See the Developing Applications with Oracle Visual Builder guide for more information.
2. Click the **Menu** icon, and select **Settings**.

   The **Tenant Settings** page appears.
3. Click **FA Services**.
4. In the **Catalog Base URL** text box, enter the CX Sales URL.

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For more information about the base URL, refer to Add a Connection for `Fusion` Applications Services in the Related Topics.

5. Click **Initialize**.
   A **Connection successful** message is displayed.

Related Topics
- Add a Connection to Oracle Cloud Applications

Configure Oracle Visual Builder with Oracle Component Exchange

Here's how to specify Oracle Component Exchange details in Oracle Visual Builder. Customers will use VBCS, connected to Oracle Component Exchange, to find the partner finder template and build their own partner finder applications.

Specify Oracle Component Exchange Details

To specify Oracle Component Exchange details in Oracle Visual Builder:

1. Sign into Oracle Visual Builder as an administrator.
2. Click the **Menu** icon, and select **Settings**.
   The **Tenant Settings** page appears.
3. Specify the Oracle Component Exchange details in the **Component Exchange** section.

   > **Note:** By default, the detail values are populated. For more information, refer to Add a Connection to the Component Exchange in the Related Topics section.

Related Topics
- Add a Connection to a Component Exchange

Create a New Partner Finder Application

This topic describes how to create a new Oracle Partner Finder application in Oracle Visual Builder.

To create a new Partner Finder application:

1. Sign in to the Oracle Visual Builder editor as a user with the Developer role.
2. Click **New**.
   The **Create Application** dialog appears.
3. In the **Application template** section, click **Change template**.
4. Click the most recent version of the **Partner Finder** tile.
   This template creates an application with basic Partner Finder functionality, including the ability to search and filter partners, view partner details, and create leads based on customer inquiry.

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5. Click **Use selected**.
6. Specify the **Application Name**.
7. Specify the **Application ID**.

   The **Application ID** is automatically derived from the specified Application Name, but you can change it, if desired. The Application ID can't be modified once the application is created: it appears in the application URL.
8. Click Finish.

   The Partner Finder application has been created. You're now ready to configure your Partner Finder application to meet your business needs.

> **CAUTION:** For your Partner Finder template to work properly, access to partners must be allowed anonymously. Configure your Oracle Visual Builder settings to allow publicly accessible applications to be created. To verify the settings, use the instructions in the topic, Verify Your Oracle Visual Builder Settings, in the Related Topics.

Related Topics
- Verify Your Oracle Visual Builder Settings

Verify Your Oracle Visual Builder Settings

Here's how to verify your Oracle Visual Builder settings:

1. Sign in to Oracle Visual Builder as a Service Administrator.
2. Click the **Home** menu.
3. Click **Settings**.

   The **Tenant Settings** screen appears.
4. On the **General** tab, locate the **Allow only secure applications to be created** option, and ensure that it's turned off.

Set Up Authentication for Your Application

For your application to run properly, you must first set up system-to-system authentication between your Partner Finder application and Oracle CX Sales.

To complete the tasks in this topic, you must be signed in to Oracle Visual Builder with a valid developer or administrator account.

To set up authentication, perform the following tasks:

1. Open your Partner Finder application in Oracle Visual Builder.
2. Click the **Service Connections** icon.

   You will see two services listed:
   - ○ crmElasticSearch
   - ○ crmRestApi
3. For each service, complete these same steps:

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    a. Click a service.

    b. Click the **Servers** tab.

    c. Click the pencil icon for the listed server.

    d. In the **Instance URL** field, update the host name using the CX Sales instance.

    e. Ensure **Allow anonymous access to the Service Connection Infrastructure** is checked.

    f. Ensure **Authentication for logged-in users** is set to **Oracle Cloud Account**.

    g. Ensure **Authentication for anonymous users** is set to **Basic**.

    h. Click the **Enter user name and password** icon by the user name field.

        i. In the user name field, enter the user name of APPID user. You created the APPID user name when setting up the APPID user. For more information, refer to the Set Up the APPID User topic.

            | **CAUTION:** Don't enter your own named account in the user name field.

        ii. In the **Password** field, enter the Oracle CX Sales password for the APPID user.

    i. Ensure **Connection type** is set to **Always use proxy** irrespective of CORS support.

    j. Click **Save**.

4. Complete these steps for both services.

Related Topics
- Set Up the APPID User

Test Your Application

Once ready, you can run your application to test it.

To complete the tasks in this topic, you must be signed in to Oracle Visual Builder with a valid developer or administrator account.

To run and test the application:

1. Sign in to Oracle Visual Builder.

2. Open your Partner Finder application.

3. Click the Play icon at the top of the page.

4. Your Partner Finder application is displayed. Execute partner searches and inquiries to test that your application works as expected.

After completing your tests, you can stage and publish the application.

Related Topics
- Stage a Visual Application
- Publish a Visual Application

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Configure Source Control for Applications

Configuring Git for source control of your application is optional.

1. In Visual Builder Studio, set up a Git repository.

   > **Note:** For groups that will be collaborating, when you're creating your project, select the **Shared** option when defining **Security**.

   > **Note:** It's recommended that you create a branch for each developer to enable your developers to work independently and then merge to the main branch when they want their changes to be shared.

2. In Oracle Visual Builder, integrate your application with a Git repository.

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4 Optional Setup Tasks

Overview of Optional Setup Tasks

Here are the optional tasks that are covered in this chapter. You can use these steps, like a checklist, to further refine your Partner Finder application.

1. Add logos to partners in CX Sales
2. Configure tier images in Visual Builder

Add Logos to Partners

Partner logos, if added, display on the Partner Finder search results page and Partner Details page. You add these logos to your partners by adding them as attachments to partner records in Oracle CX Sales.

Prerequisite

Before you can add logos as attachments, your administrator must set the Attachment Component Basic Enabled (ZCA_ATTACHMENT_ENABLE_BASIC) profile option to **No**. The default value of this profile option is **Yes**.

Add Logos to Partners

Add partner logos to partner records as a special kind of attachment. To add a logo to a partner in CX Sales:

1. Sign in to CX Sales with your channel account manager credentials, and click **Partners**.
2. From your list of partners, search for and select the partner you want to edit.
3. Click the partner's **Profile** tab.
4. In the Attachments field, click the **+** icon.

   The Attachments window displays.
5. In the Category field, select **ZPM_PARTNER_FINDER_LOGO**.
6. Click **Choose file** to browse for the logo.
7. Optionally add a title and description.
8. Click **OK**.
9. Click **Save and Close**.

Related Topics
- Set Profile Option Values

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Configure Images for Tiers

If you already use tiers to classify your partners in Oracle CX Sales, then you can configure those same tier images to display on partner records in your Partner Finder application, as well. You do this configuration in Oracle Visual Builder.

Prerequisite

Create tiers and add to programs in CX Sales.

Import the Tier Images

First, confirm that your tier images currently in use in CX Sales are also stored in Visual Builder.

1. Navigate to Web Applications > Partner Finder > Resources > images.
2. These tier images are already provided for you:

    - silver_level.jpeg
    - gold-level.jpeg
    - platinum_level.jpeg

    If you're using different tier images in CX Sales, then you must add those tier images here. Click the **+** icon to import your tier images as image files.

Map Tier Images

Confirm that your images and associated tiers are mapped correctly.

1. Navigate to Web Applications > Partner Finder.
2. Click the Variables and Types icon (x) > Variables tab.
3. In the Constants region, click **tierIdLogoMapping**.
4. The Default Value section displays the default mapping:

```
{
 "300000123945410": "resources/images/gold-level.jpeg",
 "300000123945409": "resources/images/platinum_level.jpeg",
 "300000123945411": "resources/images/silver_level.jpeg"
}
```

5. Map the correct tier IDs with the tier images that you're using in CX Sales.

    a. Replace the default tier IDs with the tier IDs currently in use in CX Sales.

       Note: Use the Tier REST service to obtain the tier ID from the `TierId` attribute: `/crmRestApi/resources/11.13.18.05/partnerTiers`

    b. Replace the tier images, if needed, with the tier images that you previously imported to the `resources/images` location.

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Related Topics

- Manage Partner Programs for Channel Managers
- Configure Tiers for Partner Programs
- REST API for CX Sales and Fusion Service

Identify Partner Finder Leads

When reviewing sales leads, Oracle CX Sales users might want to know where those leads came from. Did a salesperson generate the lead from a call? Or maybe the lead came from a specific event, like a conference.

When an anonymous user of your Partner Finder application submits a partner inquiry, this creates a lead. If CX Sales users want to identify these leads as coming from Partner Finder, then you must do some additional setup in CX Sales.

Overview of Setup

To let CX Sales users know if a lead came from your Partner Finder application, complete these steps:

1. In CX Sales, add a new value, **Partner Finder**, to the Lead Channel lookup type.
2. In Oracle Visual Builder, modify the partner inquiry page's REST call so that, when a user submits a partner inquiry, the **Partner Finder** value is passed to CX Sales as part of the lead creation.

Add a New Value for Lead Channel

In Setup and Maintenance, add a new **Partner Finder** lookup code to the lookup type Lead Channel (MKL_LEAD_CHANNEL_SETID).

1. Open the task **Manage Set Enabled Lookups** from the Setup and Maintenance work area:

   - Offering: Sales
   - Functional Area: Leads
   - Show: All Tasks
   - Task: Manage Set Enabled Lookups

2. On the Manage Set Enabled Lookups page, search for `Lead Channel` in the **Meaning** field.

   The lookup type and the available values, called lookup codes, appear below.

3. Add the new **Partner Finder** value by clicking **New** (the plus sign icon).

   - Lookup Code: PARTNER_FINDER
   - Meaning: Partner Finder

4. Click **Save and Close**.

To confirm that you added the new lookup code correctly, edit an existing lead and view the list of values in the Source field. You should see a choice for **Partner Finder**.

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Update the Partner Inquiry Page's REST Call to CX Sales

When a user submits an inquiry from the partner inquiry page, this submission creates a lead using the Leads REST API. In Visual Builder, modify the REST call so that, when a lead is created, the **Partner Finder** value is automatically passed as part of the lead.

To modify the REST call from the partner inquiry page:

1. Navigate to Web Applications > partnerfinder > Flows > partner-finder > partner-finder-profile.
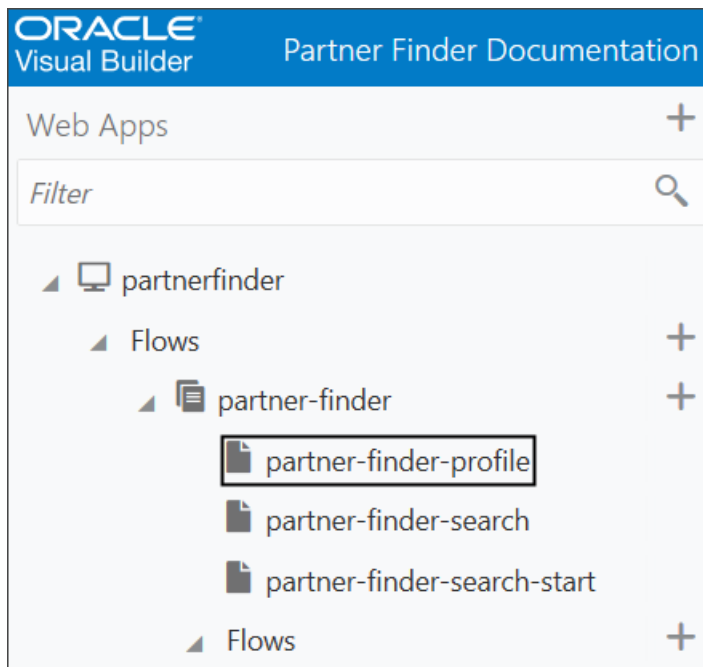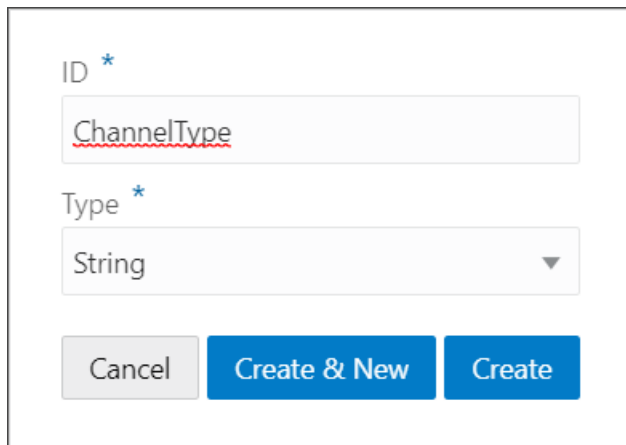
2. Click the Variables and Types icon (x) > Types tab > LeadType.

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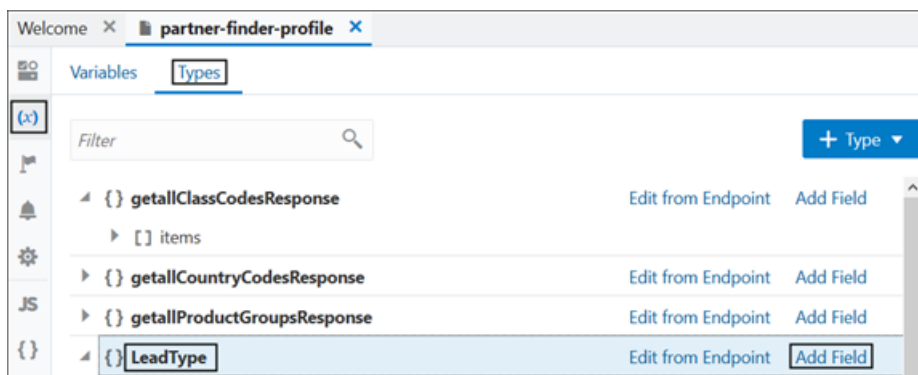
3. Add the Source field (ChannelType) to the type (LeadType) which is used for partner inquiry.

   The Source field will now be included in the REST call to CX Sales when creating a lead from Partner Finder.
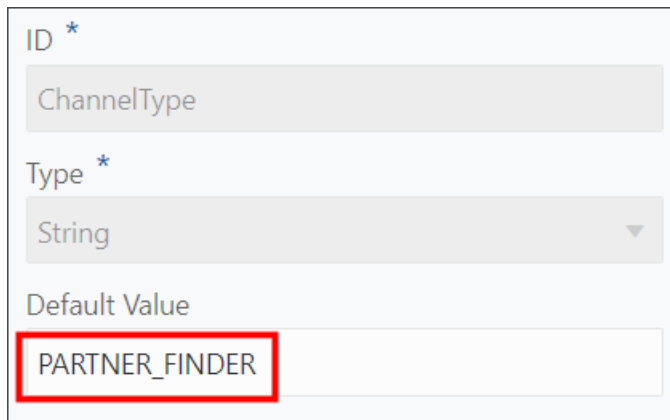
4. Click the Variables and Types icon (x) > Variables tab > newLead.
5. Click the ChannelType field.

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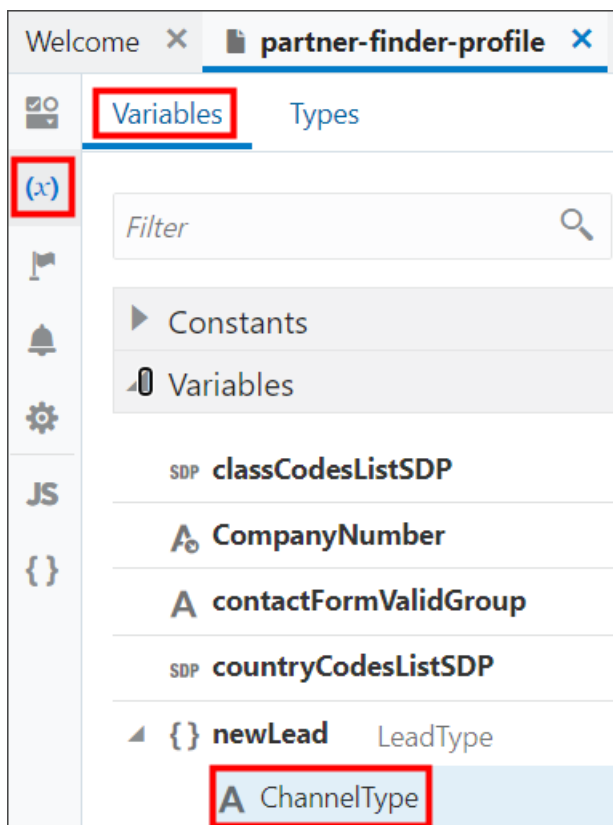
6. In the Default Value field, enter the PARTNER_FINDER lookup code that you just created.

   This is the value that will be passed to CX Sales as part of the REST call when creating a new lead.

Note: You don't need to expose this attribute in the partner inquiry page itself.

Related Topics

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5 Additional Configuration Tasks

Apply Themes to Your Partner Finder Application

This topic describes how to apply themes to your own Partner Finder application.

Oracle JET includes themes that provide styling across a web or hybrid mobile application. You can use these themes as provided, or you can configure them manually and through the tooling.

For more information about applying themes to your Partner Finder application, refer to the chapter related to applying themes in the Developing Applications with Oracle JET guide, in the Related Topics.

Related Topics
- Developing Applications with Oracle Visual Builder
- Developing Applications with Oracle JET

Change the Appearance of Your Partner Finder Application

This topic describes how to change the appearance of your own Partner Finder application.

The Oracle Partner Finder template has been styled to enhance its appearance. This has been done by modifying objects and adding styles to the `app.css` file.

To modify objects in the `app.css` file:

1. Navigate to the Oracle Visual Builder.
2. Open your Partner Finder application.
3. Click **Web Apps**.
4. Expand `partnerfinder`, expand `resources`, expand `css`, then click `app.css`.

    The `app.css` tab appears.
5. Locate and configure the object that you want to modify. For example, to modify the background image used in the Partner Finder application, modify the partner-finder CSS class selector:

    ```
    .partner-finder {
     background-image: url('../images/body_bg_texture.png');
     background-repeat: repeat;
     background-color: #292623;
     color: #ffffff;
     background-size: contain;
    }
    ```

CSS classes defined in `app.css` can then be referenced in the HTML of the application. For example, we have this code in `Root pages/shell-page.html`:

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```
<div id="page" class="partner-finder oj-web-applayout-page">
```

You can also use Oracle JET themes to provide consistent appearance of components across your Partner Finder application. For more information about Oracle JET themes refer to the `Theming Applications` chapter in the Developing Applications with Oracle JET guide, in the Related Topics.

Once an Oracle JET theme is created it can be added uploaded to `resources/css` and then referenced in the `index.html` of the application with code like this:

```
...
 <link type="text/css" rel="stylesheet" href="resources/css/app.css">
 <link type="text/css" rel="stylesheet" href="resources/css/myJETTheme.css">
...
```

Related Topics
- Theming Applications

Localize Your Partner Finder Application for Multilingual Support

This topic describes how to localize your Partner Finder application for multilingual support.

How You Create Localized Partner Finder Applications

You can create localized versions of your application by translating the UI text and messages in your application into other languages. The localized strings are displayed in the application during runtime. When you run the staged or published application, a localized version is displayed based on the language settings of your browser.

A Partner Finder application created using the Partner Finder template includes translations to the 24 languages listed below. While the template is delivered with these translated strings and files, any modifications that you apply to the strings in your Partner Finder application will require additional translation.

The supported language locales are as follows: `cs, da, de, es, fi, fr-CA, fr, hu, it, iw, ja, ko, nl, no, nl, pt-BR, ro, ru, sk, sv, th, tr, zh-CN, zh-TW`.

The resource bundles provide an initial set of translated strings for the majority of the application that you can use for your own translation files. To populate the rest of the translation files for the languages you want to support, follow the instructions for generating files for new languages, and then use the existing translated files to obtain translations for use in your new file.

The Partner Finder template comes with a single, application-specific bundle. If you create strings, then you must add the translations to the bundle, or create bundles.

For comprehensive information about adding translated text to your application, refer to the Work with Translations topic in the Develop Applications chapter of the Developing Applications with Oracle Visual Builder guide in the Related Topics section.

Create Translations for New Languages

You can introduce a new language beyond the ones delivered with a Partner Finder application that was created using the template.

For more information, refer to the Work with Translations topic in the Developing Applications with Oracle Visual Builder in the Related Topics.

To introduce a new language beyond the ones delivered with a Partner Finder application that was created using the template, follow these steps:

1. Sign in to Oracle Visual Builder.
2. Open your Partner Finder application.
3. Click the **Menu** icon in the editor, and select **Settings**.

   The **Settings** tab appears.
4. Click the **Translations** secondary tab.
5. Download the latest language bundle by clicking the `ARB` or `XLIFF` download link in the **Download all strings** section.

   Both formats are supported and you can click either download link.

   A `zip` file is downloaded.
6. Extract the `zip` file.
7. Open the `partnerfinder_app` directory.
8. Rename the `app-strings` file to `app-strings-<locale>.arb` or `app-strings-<locale>.xliff`, depending on the downloaded file type. Replace `<locale>` with the language locale.

   For example, for a file containing Welsh translations, the modified file name should be: `app-strings-cy.arb` or `app-strings-cy.xliff`.
9. Open your `app-strings-<locale>` file in a text editor. The first few lines of the file will resemble the following:

   ```
   {
    "@@x-bundleName" : "app",
    "@@x-bundlePath" : "webApps/partnerfinder/resources/strings/app/nls/app-strings",
    "shell_footer_signin_to_partner_portal" : "Sign in to Partner Portal",
    "@shell_footer_signin_to_partner_portal" : {
    "description" : "Link to separate Partner Portal application.",
    "source_text" : "Sign in to Partner Portal"
    },
    "shell_footer_subscribe_to_emails" : "Subscribe to Emails",
    "@shell_footer_subscribe_to_emails" : {
    "description" : "Link to subscribe to company email updates.",
    "source_text" : "Subscribe to Emails"
    },
    "contactform_cancel_button" : "Cancel",
    "@contactform_cancel_button" : {
    "description" : "Button label that displays on the partner inquiry page. Users can click this button to
    cancel their partner inquiry.",
    "source_text" : "Cancel"
    },
    "contactform_submit_button" : "Submit",
    "@contactform_submit_button" : {
    "description" : "Button label that displays on the partner inquiry page. Users can click this button to
    submit their partner inquiry.",
    "source_text" : "Submit"
   ```

10. Replace the English strings with the translation for the language you're creating. Consider the following `Cancel` string:

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```
},
"contactform_cancel_button" : "Cancel",
"@contactform_cancel_button" : {
"description" : "Button label that displays on the partner inquiry page. Users can click this button to
cancel their partner inquiry.",
"source_text" : "Cancel"
},
```

You would want to replace the string after the `"contactform_cancel_button":  "` with the translated language equivalent. In this example, you would want to replace the string `Cancel` with the Welsh equivalent for Cancel, which is `Canslo`. The modified text will look similar to the following:

```
},
"contactform_cancel_button" : "Canslo",
"@contactform_cancel_button" : {
"description" : "Button label that displays on the partner inquiry page. Users can click this button to
cancel their partner inquiry.",
"source_text" : "Cancel"
},
```

11. Repeat step 10 for all the strings in the language that you're creating.
12. Save your `app-strings-<locale>` file.
13. Add the `app-strings-<locale>` file to the `zip` file that you downloaded in step 5, and save the updated `zip` file.
14. Click the **Menu** icon in the editor, and select **Settings**.
    The **Settings** tab appears.
15. Click the **Translations** secondary tab.
16. Upload the `zip` file that you saved in step 13, containing your new `app-strings-<locale>` file, to the **Upload updated bundle** section.
    The language is added to the bundle.
17. Navigate to Web Applications > partnerfinder > Flows > partner-finder > Resources > strings > app > `nls` > { } app-strings.json.
18. In the { } app-strings.json file, add an entry for the new language that you're adding. For example, append the following line to the .json file:
    ```
    "cy" : true
    ```

Add or Update String Translations for Existing Languages

You can translate additional strings after modifying strings in your Partner Finder application generated from the template.

For more information, refer to the Work with Translations topic in the Developing Applications with Oracle Visual Builder in the Related Topics.

To add or update string translations for existing languages:

1. Sign in to Oracle Visual Builder.
2. Open your Partner Finder application.
3. Click the **Menu** icon in the editor, and select **Settings**.
    The **Settings** tab appears.
4. Click the **Translations** secondary tab.
5. Download the latest language bundle by clicking the `ARB` or `XLIFF` download link in the **Download all strings** section.

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Both formats are supported and you can click either download link.

A `zip` file is downloaded.

6. Extract the `zip` file.

7. Open the `partnerfinder_app` directory.

8. Open any `app-strings-<locale>` file in a text editor.

   For example, if you added a string and now want it translated to French, then open `app-strings-fr.arb` or `app-strings-fr.xliff`.

9. Add the new French string to the file.

   Let's say you added a `submit` string to your application and now want it translated to French.

   Add the string with the translated language equivalent to the file, as follows:

   ```
   },
   "contactform_submit_button" : "Soumettre",
   "@contactform_submit_button" : {
   "description" : "Button label that displays on the partner inquiry page. Users can click this button to
   submit their partner inquiry.",
   "source_text" : "Submit"
   },
   ```

   You can also modify the translation of an existing string in this file.

10. Repeat steps 8 and 9 for all the languages that are relevant to your application.

11. Save your `app-strings-<locale>` file.

12. Add your new English string to the English-only `app-strings` file, as well.

13. Add the `app-strings-<locale>` file to the `zip` file that you downloaded in step 5. Also add the revised `app-strings.arb` or `app-strings.xliff` file, depending on the downloaded file type. Save the updated `zip` file.

14. Click the **Menu** icon in the editor, and select **Settings**.

    The **Settings** tab appears.

15. Click the **Translations** secondary tab.

16. Upload the `zip` file that you saved in step 12, containing your modified `app-strings-<locale>` files, to the **Upload updated bundle** section.

    The language bundle is updated with the new string translations for the existing languages that you modified.

Organize Non-Translated Strings

If you have strings that don't require translation, such as product names or company names, then add such strings to the `shell-strings.arb` or `shell-strings.xliff` file in the partnerfinder_shell directory. (You get the partnerfinder_shell directory when you download the latest language bundle.) Follow this best practice to more easily distinguish between translated and non-translated strings.

Related Topics
- Developing Applications with Oracle Visual Builder
- Work with Translations

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Case Study: Add a Custom Attribute to Your Partner Finder

CX Sales REST Attributes Mapping

This table lists the CX Sales REST attribute mappings that are used in the default Partner Finder application template. This is the current Partner Finder configuration, but you can make additional changes, such as adding a custom attribute.

The rest of this section walks you though an example of how to add a custom attribute to your Partner Finder application.

Screen	Display Name	REST Service Name	REST Attribute Name
Partner Search - Keywords	Name	/crmRestApi/searchResources/latest/custom-actions/queries	keywordsFields: OrganizationName
Partner Search - Keywords	Type	/crmRestApi/searchResources/latest/custom-actions/queries	keywordsFields: ListOfPartnerTypes
Partner Search - Keywords	Location	/crmRestApi/searchResources/latest/custom-actions/queries	keywordsFields: PrimaryAddress
Partner Search - Results Partner	Name	/crmRestApi/searchResources/latest/custom-actions/queries	OrganizationName
Partner Search - Results	City	/crmRestApi/searchResources/latest/custom-actions/queries	PrimaryAddress: City
Partner Search - Results	Country	/crmRestApi/searchResources/latest/custom-actions/queries	PrimaryAddress: CountryCode_ localizedValue
Partner Search - Results	Logo	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}/child/attachments	FileUrl
Partner Search - Filters	Tier	/crmRestApi/searchResources/latest/custom-actions/queries	aggregations: Tier
Partner Search - Filters	Type	/crmRestApi/searchResources/latest/custom-actions/queries	aggregations: Type
Partner Search - Filters	Country	/crmRestApi/searchResources/latest/custom-actions/queries	aggregations: Country

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Screen	Display Name	REST Service Name	REST Attribute Name
Partner Search - Recently Viewed	Partner Name	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}	OrganizationName
Partner Search - Recently Viewed	Logo	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}/child/attachments	FileUrl
Partner Search - Recently Viewed	City	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}	City
Partner Search - Recently Viewed	Country	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}	Country
Partner Details	Partner Name	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}	OrganizationName
Partner Details	Partner Logo	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}/child/attachments	FileUrl
Partner Details	Partner Tier	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}	TierName
Partner Details	Types	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}/child/types	PartnerTypeName
Partner Details	Primary Address	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}	FormattedAddress
Partner Details	Primary Phone number	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}	• PhoneCountryCode • PhoneAreaCode • PhoneNumber
Partner Details	Email	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}	EmailAddress
Partner Details	Website	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}	URL
Partner Details	About	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}	PartnerSummary
Partner Details	Solution Overview	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}	SolutionOverview

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Screen	Display Name	REST Service Name	REST Attribute Name
Partner Details	Focus Areas	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}/child/productSpecialities	ProductName
Partner Details	Geographies Served	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}/child/geographies	GeographyName
Partner Details	Industries Served	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}/child/industries	ClassificationName
Partner Details	Certifications	/crmRestApi/resources/latest/partners/{COMPANY_NUMBER}/certifications	CertificationName
Partner Inquiry	Partner (hidden in UI)	/crmRestApi/resources/latest/leads	PartnerCompanyNumber
Partner Inquiry and Confirmation	First Name	/crmRestApi/resources/latest/leads	PrimaryContactPersonFirstName
Partner Inquiry and Confirmation	Last Name	/crmRestApi/resources/latest/leads	PrimaryContactPersonLastName
Partner Inquiry and Confirmation	Email Address	/crmRestApi/resources/latest/leads	PrimaryContactEmailAddress
Partner Inquiry and Confirmation	Contact Number	/crmRestApi/resources/latest/leads	• PrimaryPhoneCountryCode • PrimaryPhoneNumber
Partner Inquiry and Confirmation	Company Name	/crmRestApi/resources/latest/leads	CustomerPartyName
Partner Inquiry and Confirmation	Description	/crmRestApi/resources/latest/leads	Description

Overview of Configuring Your Partner Finder

After you build your Partner Finder application, you might want to add custom attributes to track various pieces of data that uniquely support your business. This section walks you through how to do just that.

We will look at how to add the Region field to your Partner Finder application, so that users can more easily track where partners are located.

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Prerequisites

Before you can add the Region field to your Partner Finder application, you must complete these prerequisite steps:

1. Create the Region field on the Partner object.
2. Configure the field for adaptive search.

1. Create the Custom Attribute

Create the Region field on the Partner object in Application Composer.

1. When defining the custom field, select these check boxes:

   o Enable the **Include in Service Payload** check box.

      Selecting this check box means that the field will be enabled for REST services. The custom field must be available in Oracle's REST APIs before you can add this custom field to your Partner Finder application in VBCS.

   o Enable the **Searchable** check box.

      This will let users search and filter on partners using a region value in their Partner Finder.

2. After you create the custom field, record the internal field name that displays in Application Composer. You will use the internal field name in VBCS when adding the custom field to your Partner Finder application.

   In this example, the internal field name is Region_c. This means that these names are used by the following REST services:

   a. Partners REST Service: PartnerProfilePEO_Region_c
   b. Adaptive Search REST Service: Region_c

2. Configure Adaptive Search

This step is required if you want users to search and filter on partners using a region value in their Partner Finder.

Enable the Region field for adaptive search.

For more information, see "Configure Search Attributes" in the Enable, Configure, and Use Adaptive Search documentation.

Next Steps

After you create the custom field and enable it for adaptive search, you can then proceed to add the field to your Partner Finder application. The rest of this section walks you through adding your custom field to these pages:

- Partner Keyword Search

- Partner Card in Search Results

- Partner Finder Filter

- Partner Details

- Partner Inquiry

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Add a Custom Attribute to the Partner Keyword Search

In this example, let's look at how to add the custom Region field to the Partner Keyword Search page in your Partner Finder application. This will let users search for partners by region. You do this in VBCS.

In VBCS, complete these steps:

1. Navigate to Web Applications > partnerfinder > Flows > partner-finder.
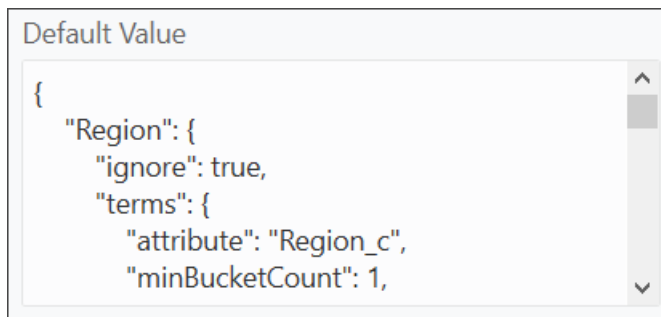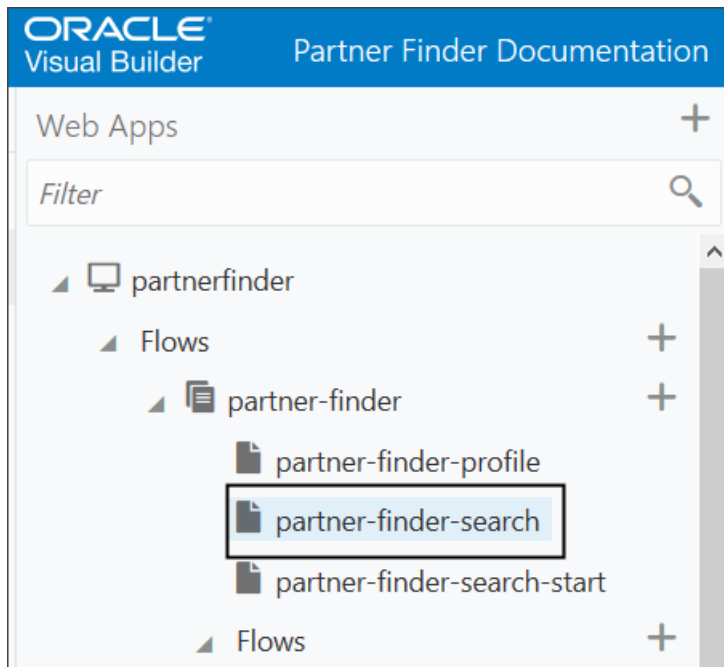2. Click the Variables and Types icon (x) > Variables tab > keywordFields.
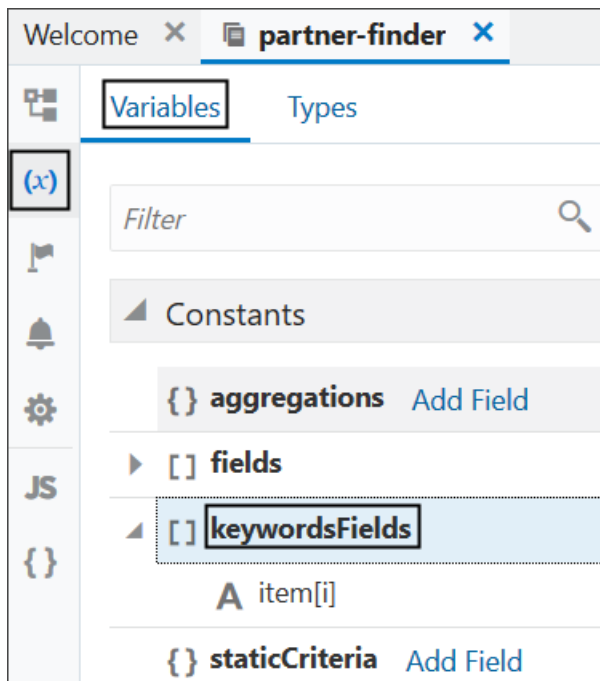
3. In the Default Value region, add the custom Region field, Region_c, to the existing list of keywords so that users can search for partners by region.

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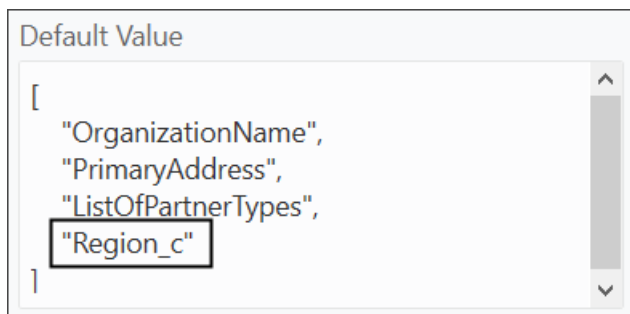
4. Add the custom Region field, Region_c, to the search hint text so that users are alerted that they can search for partners by region.
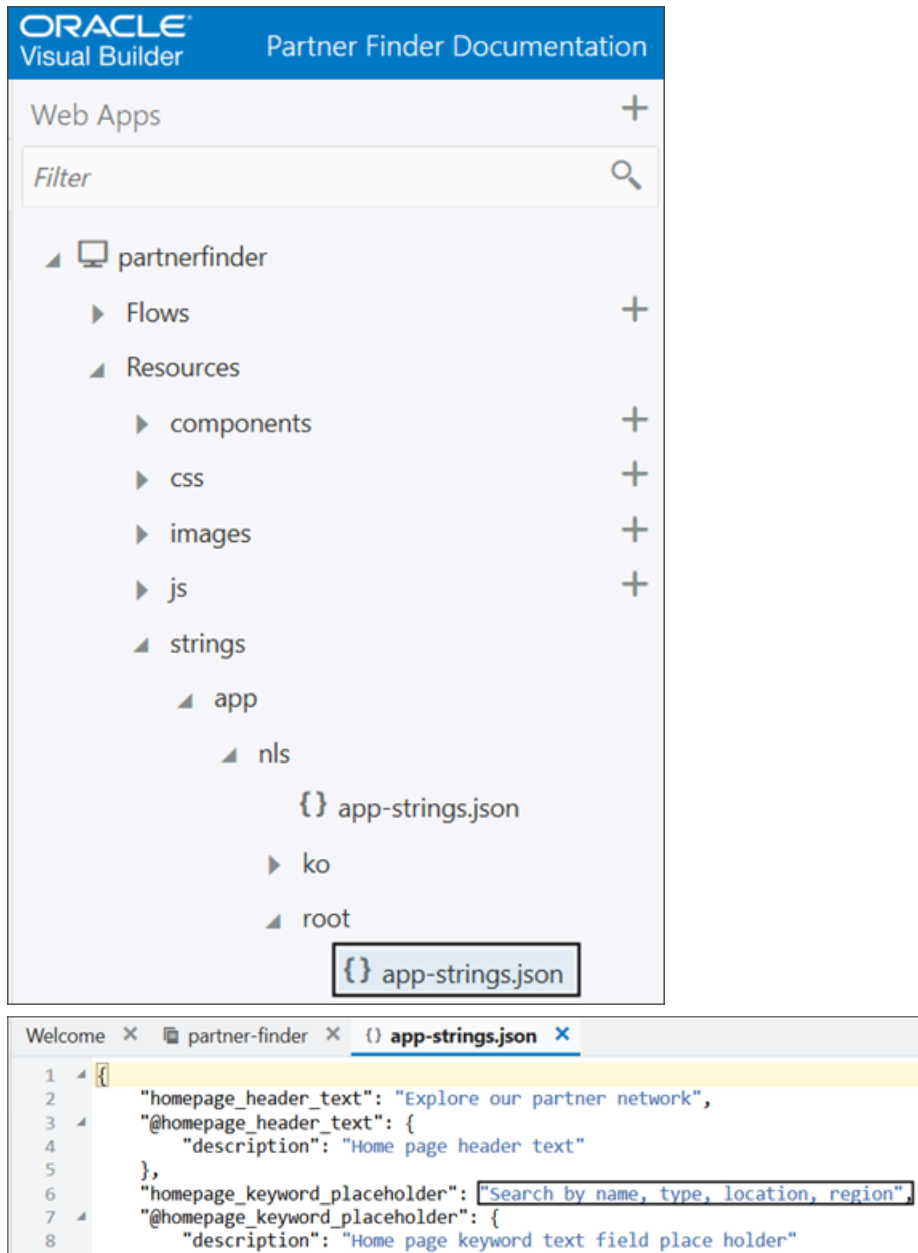
5. Click the Play icon to run the application to verify the change.

6. Verify the change. Notice that the "region" keyword is now added to the hint text in the search box.
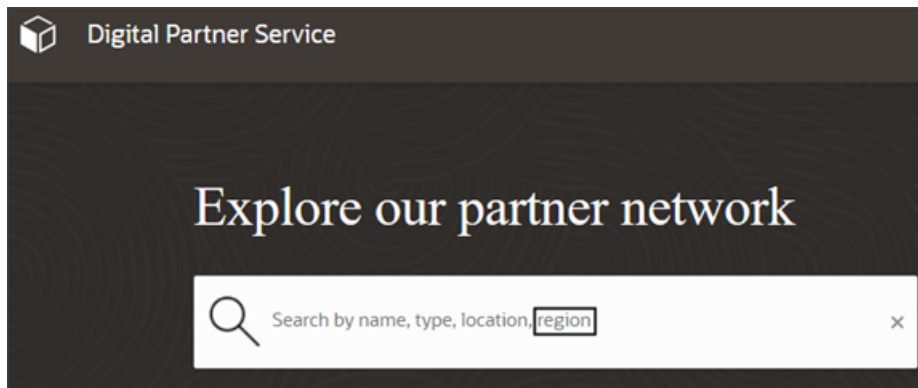
Add a Custom Attribute to the Partner Card in Search Results

In this example, let's look at how to add the custom Region field to the Partner Card, in your Partner Finder search results. This will let users more easily see where the partners that they searched for are located.

In VBCS, complete these steps:

1. Navigate to Web Applications > partnerfinder > Flows > partner-finder.
2. Click the Variables and Types icon (x) > Variables tab > fields.

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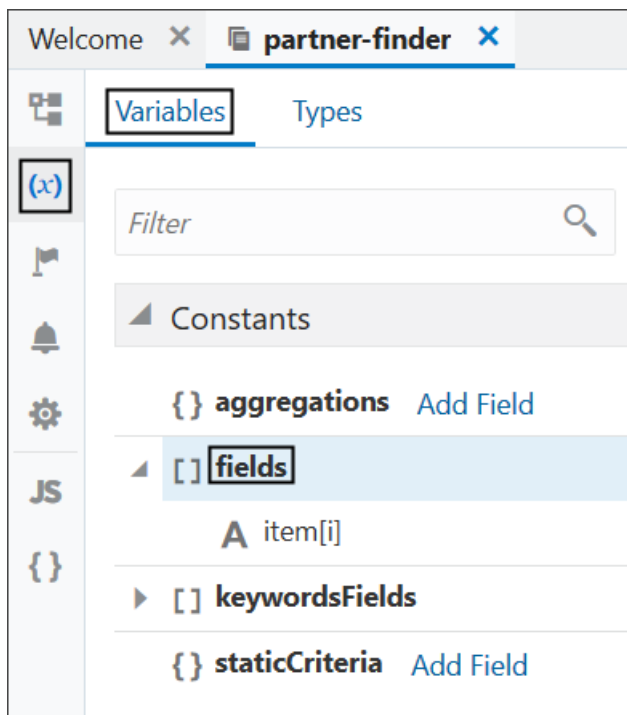
3. In the Default Value region, add the custom Region field, Region_c, to the existing list of fields required in the search response.

   This means that the Region field will be included in the search results.
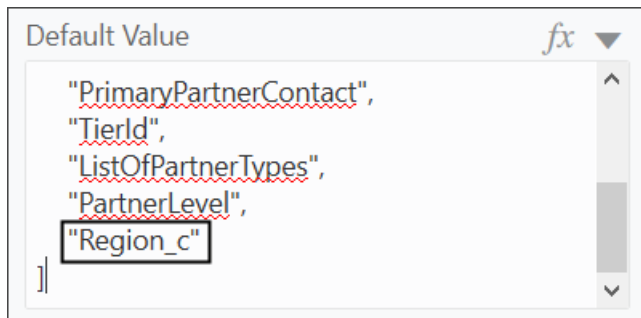
4. Navigate to Web Applications > partnerfinder > Flows > partner-finder > partner-finder-search.
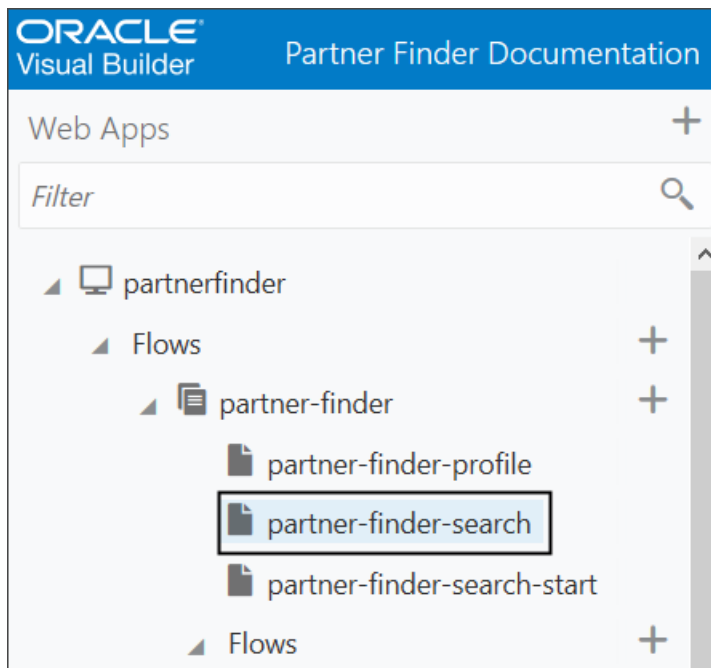
5. Click the Variables and Types icon (x) > Types tab > PartnerResultsResponse > item[i].

   Then click the Add Field button.
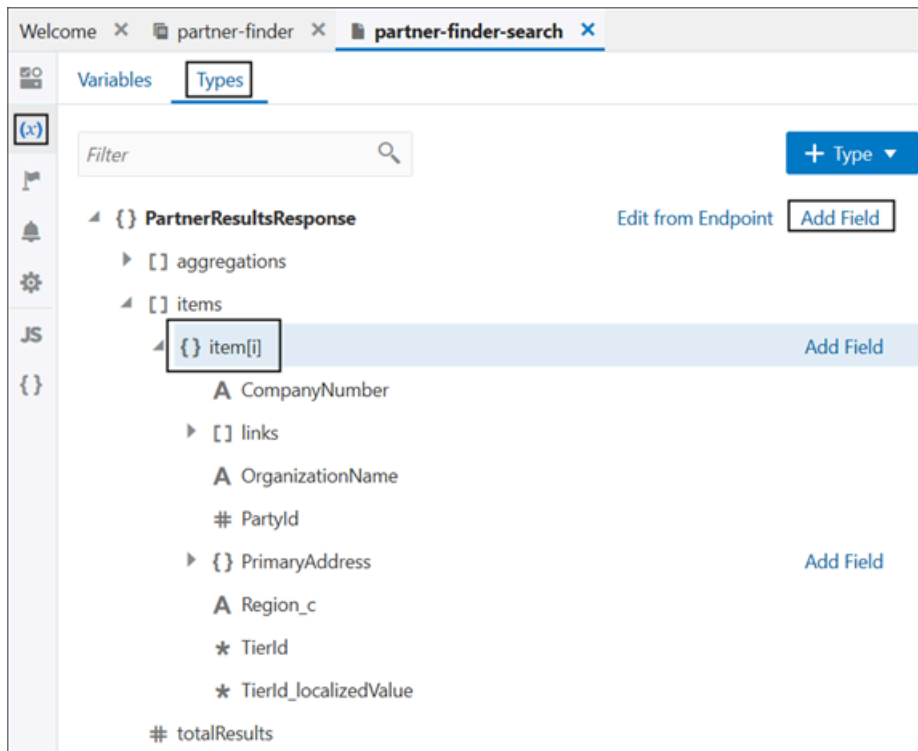
6. Add the custom Region field, Region_c, to the list type which is used in the search results page.

7. Navigate to Web Applications > partnerfinder > Flows > partner-finder > partner-finder-search > Designer.
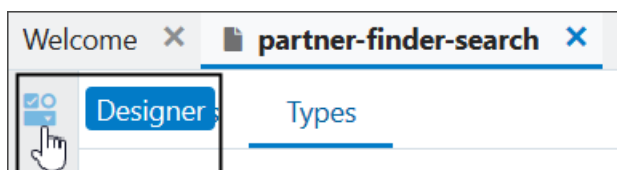
8. Add the custom field, Region_c, to the search results html page inside the partner card.

Tap the section where you want the new custom field to be displayed and append the corresponding text section with $current.data.Region_c. (This is the new field that you added in the previous step.)
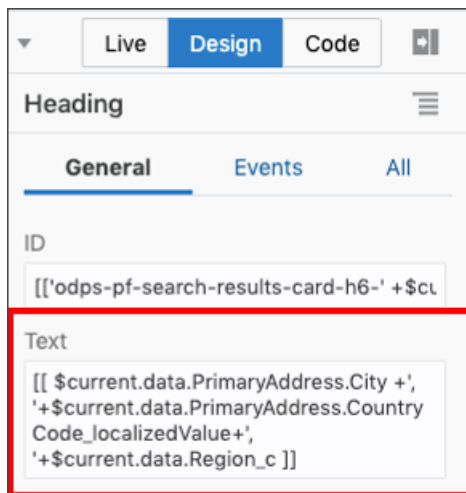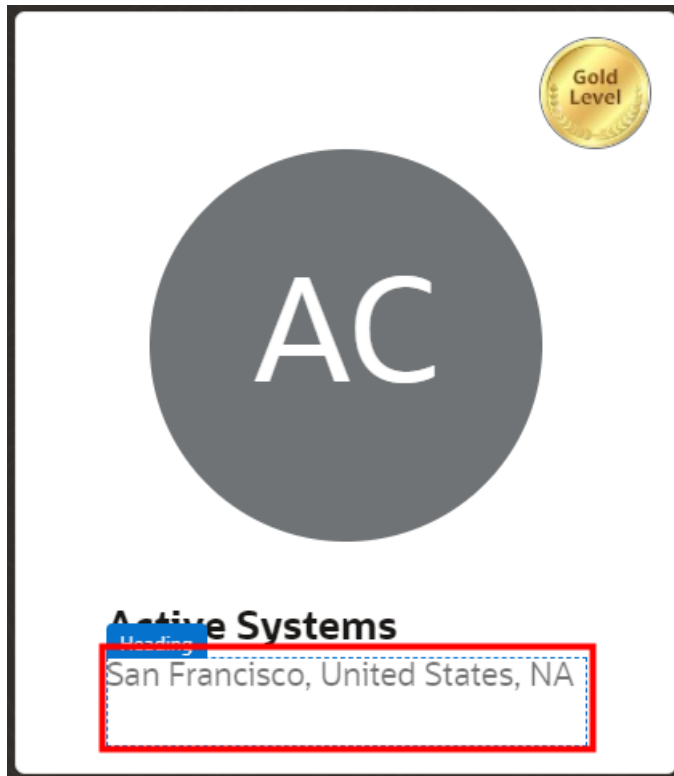
9. Click the Play icon to run the application to verify the change.

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10. Verify the change. Notice that region information is now added to the Partner Card in the Partner Finder search results.
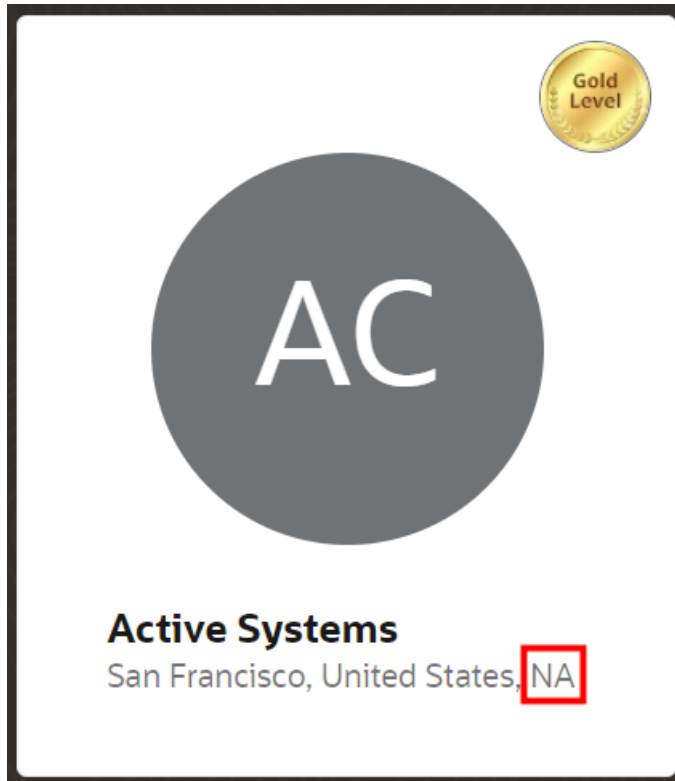
Add a Custom Attribute to the Partner Finder Filter

In this example, let's look at how to add a custom Region filter to your Partner Finder application. This will let users filter partner search results by region.

In VBCS, complete these steps:

1. Navigate to Web Applications > partnerfinder > Flows > partner-finder.

2. Click the Variables and Types icon (x) > Variables tab > aggregations.
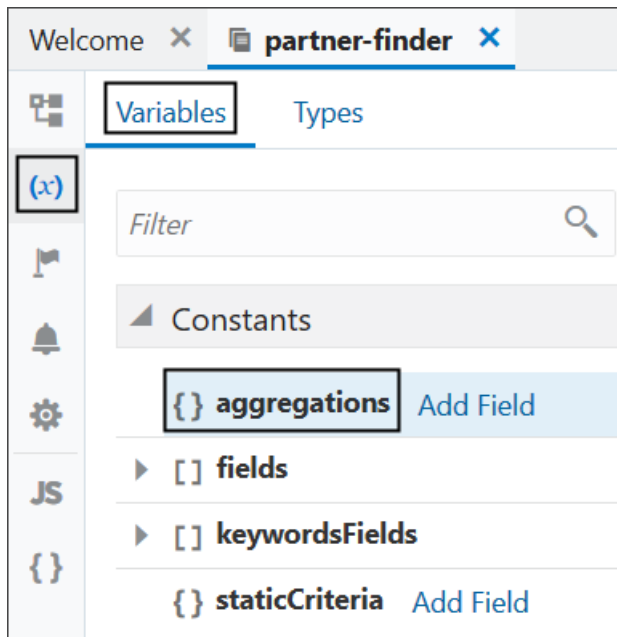
3. In the Default Value region, add the custom Region field to the aggregations using the below code:

```
"Region": {
 "ignore": true,
 "terms": {
 "attribute": "Region_c",
 "minBucketCount": 1,
 "maxNumberOfBuckets": 4,
 "other": false,
 "missing": false,
 "localize": true
 }
 },
```

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4. Navigate to Web Applications > partnerfinder > Flows > partner-finder-search.
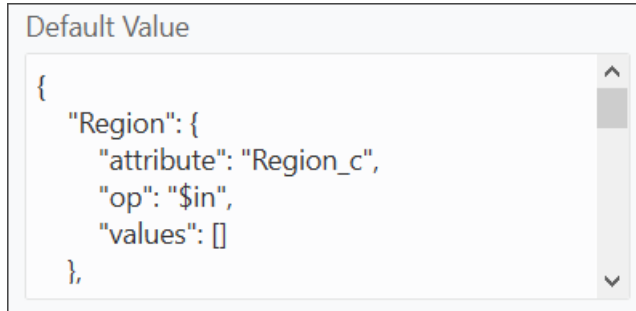
5. Click the Variables and Types icon (x) > Variables tab > additionalCriteria.
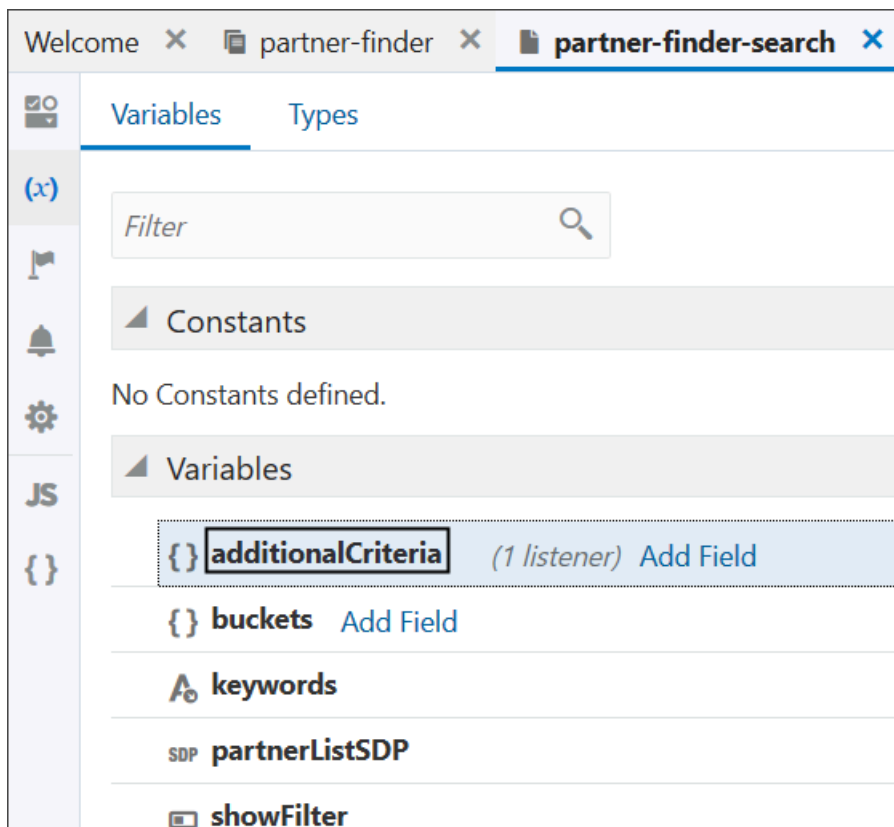
6. In the Default Value region, add the custom attribute to additionalCriteria using the below code:

```
"ElasticCustAggregation": {
"attribute": "Region_c",
"op": "$in",
"values": []
},
```

Default Value

```
{
    "Region": {
        "attribute": "Region_c",
        "op": "$in",
        "values": []
    },
```

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7. Add the custom field name, Region, to the string repository so that it can be referenced within the application.
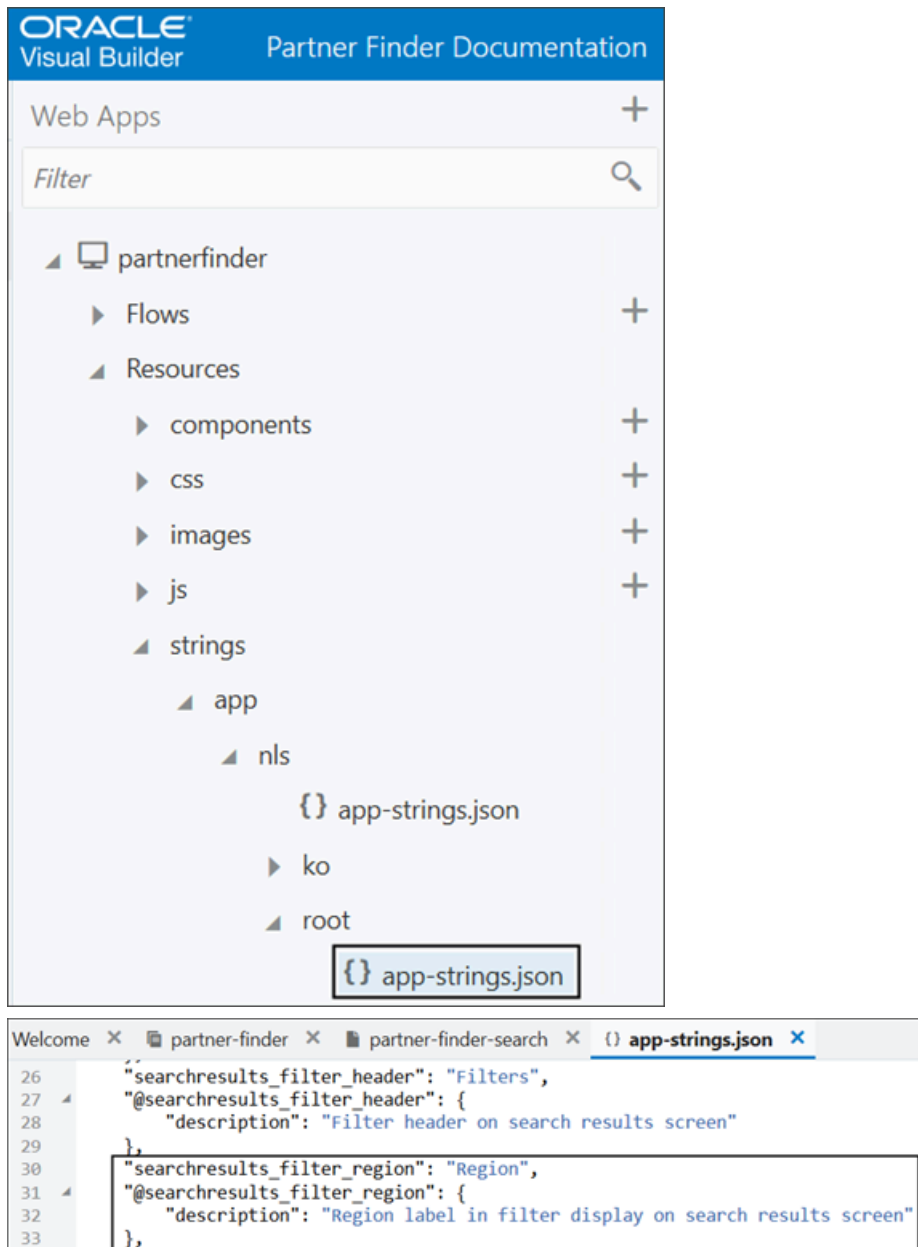
8. Navigate to Web Applications > partnerfinder > Flows > partner-finder > partner-finder-search > Designer > click the Code button.

9. Add the custom attribute to the partner finder search html page using the below code:

```
<oj-bind-if test="[[ $variables.buckets.Region && $variables.buckets.Region.length>0 ]]">
 <div>
 <oj-label id="odps-pf-search-filter-region-Label" class="odps-pf-search-results-filter-label"><oj-bind-
text value="[[ $application.translations.app.searchresults_filter_region ]]"></oj-bind-text></oj-label>
```

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```
 <oj-checkboxset id="odps-pf-search-filter-region-checkbox" labelled-by="odps-
pf-search-filter-region-Label" class="odps-pf-search-results-filter-checkbox"
 value="{{ $variables.additionalCriteria.Region.values }}">
 <oj-bind-for-each data="[[ $page.variables.buckets.Region ]]">
 <template>
 <oj-option value="[[$current.data.key]]">
 <oj-bind-text value="[[ $current.data.localizedKey + ' (' + $current.data.count + ')' ]]"></oj-bind-
text>
 </oj-option>
 </template>
 </oj-bind-for-each>
 </oj-checkboxset>
 </div>
</oj-bind-if>
```
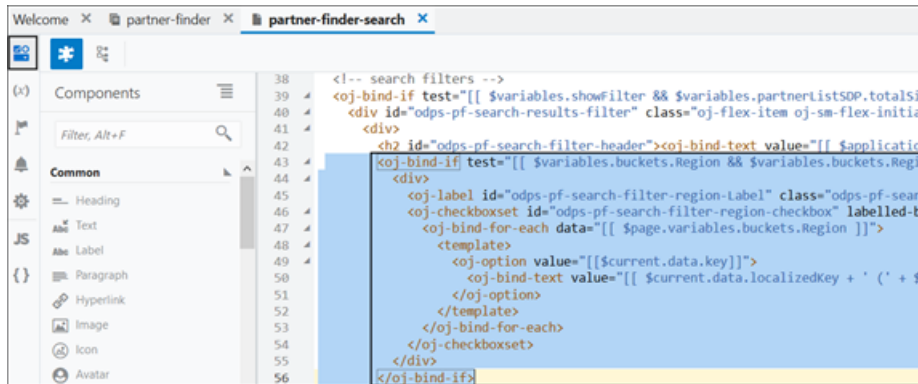

10. Navigate to Web Applications > partnerfinder > Flows > partner-finder > partner-finder-search > Actions > SearchKeywordValueChangedAction.
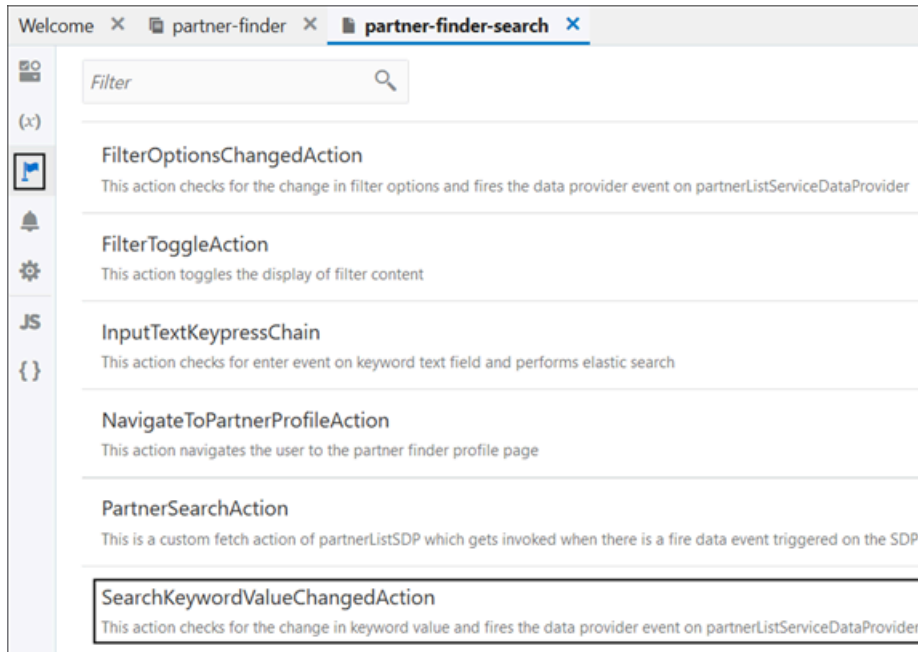
11. Update the condition for ifFilterIsEmpty as follows:

```
[[ $page.variables.additionalCriteria.Country.values.length === 0
 && $page.variables.additionalCriteria.Tier.values.length === 0 &&
```

```
$page.variables.additionalCriteria.Type.values.length === 0 && $page.variables.additionalCriteria.
Region.values.length === 0]]
```
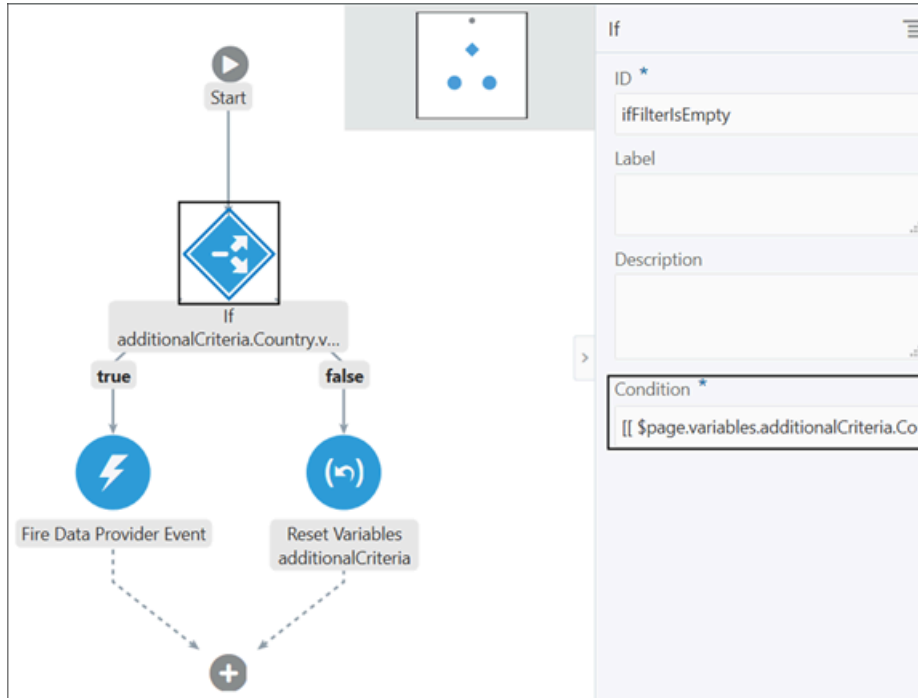

12. Navigate to Web Applications > partnerfinder > Flows > partner-finder > partner-finder-search > Actions > refreshFilters.
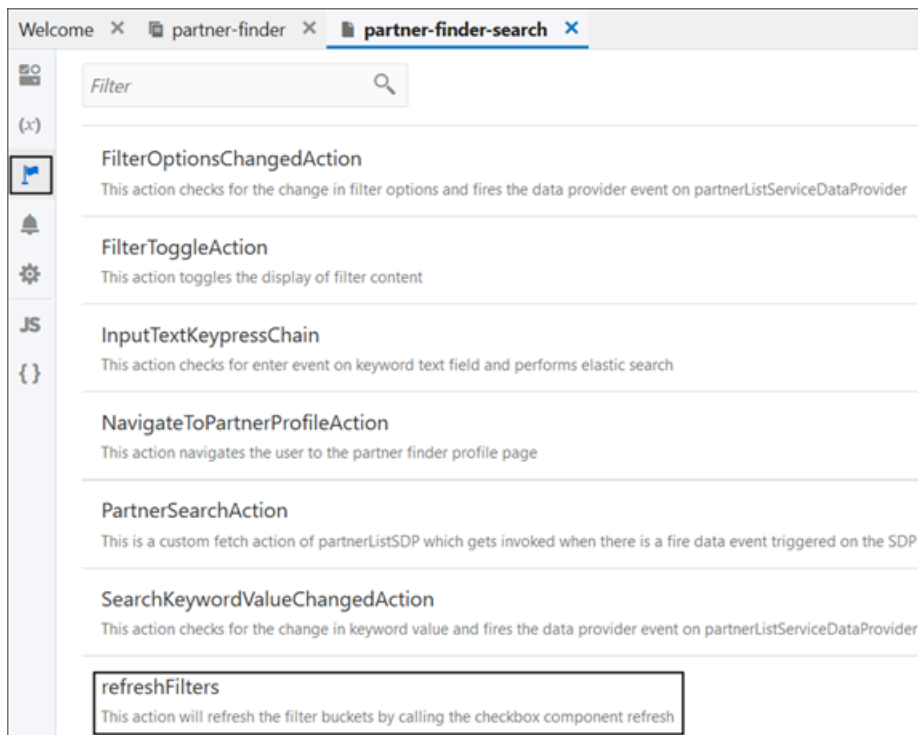
13. Add an additional refresh condition for the custom attribute as mentioned below:

    a. Add an if condition to "Run in Parallel" as follows:

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```
[[ $page.variables.buckets.Region && $page.variables.buckets.Region.length > 0 ]]
```
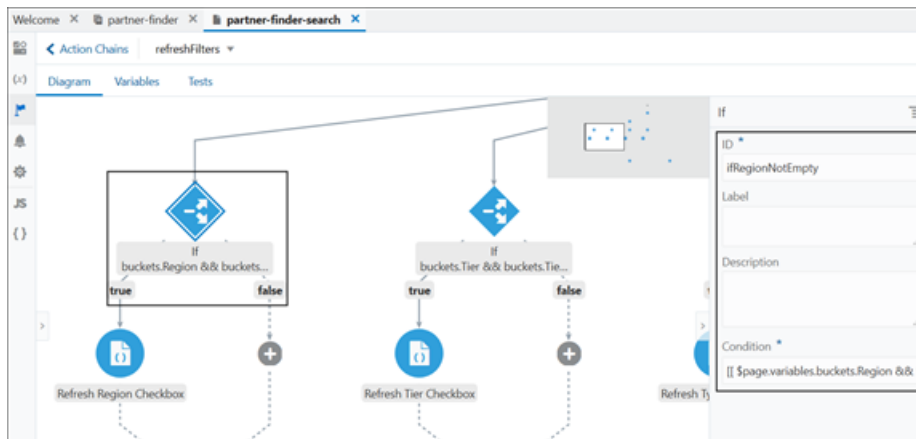

b. Add the call component method and link it to the corresponding check box component (odps-pf-search-filter-region-checkbox):
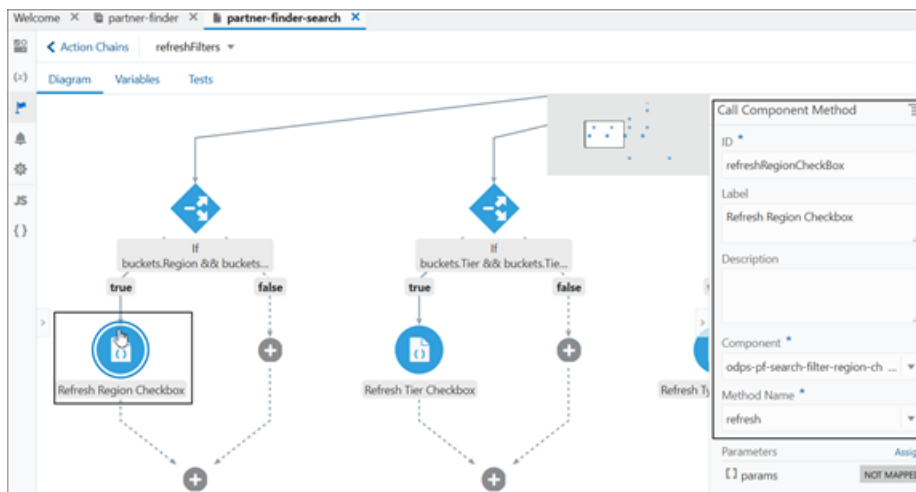
14. Click the Play icon to run the application to verify the change.

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15. Verify the change. Notice that there is now a custom Region filter in your Partner Finder application.
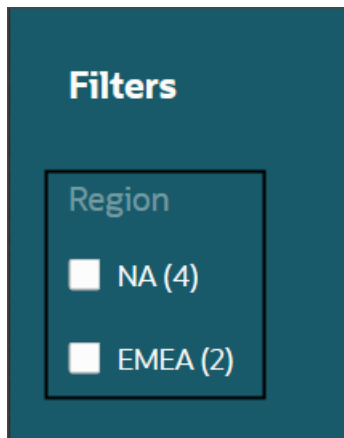
Add a Custom Attribute to the Partner Profile

In this example, let's look at how to add the custom Region field to the partner profile. This will let users more easily see where a partner is located. You do this in VBCS.

In VBCS, complete these steps:

1. Navigate to Web Applications > partnerfinder > Flows > partner-finder > partner-finder-profile.

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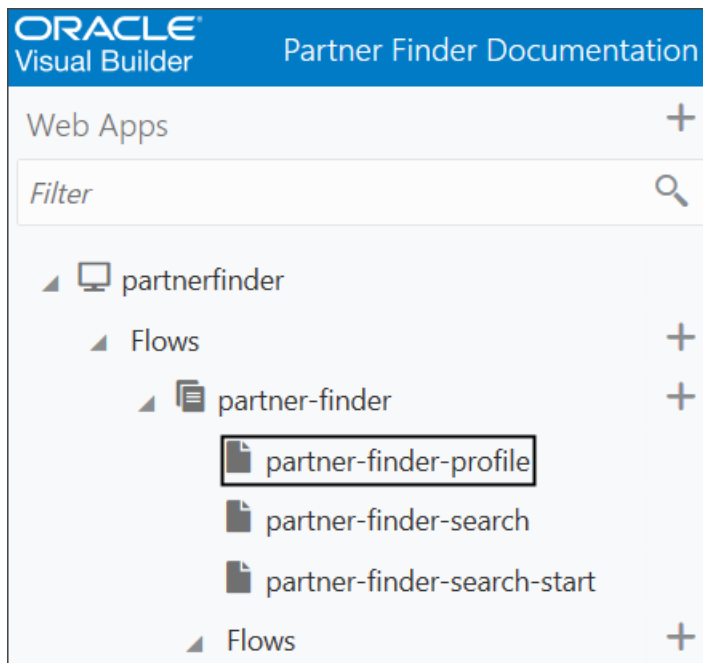
2. Click the Variables and Types icon (x) > Types tab > PartnerProfileType.

   Click the Add Field link.
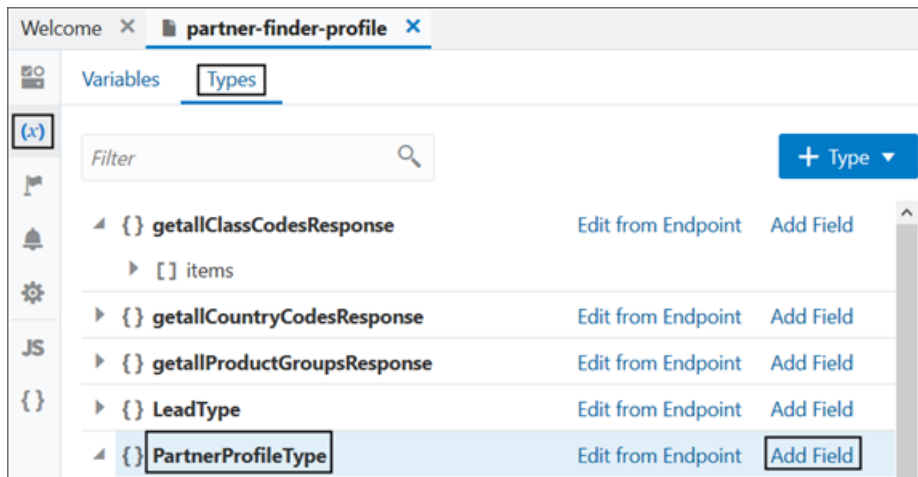
3. Add the custom field (PartnerProfilePEO_Region_c) to the type (PartnerProfileType), which is used in the partner profile page.

   This means that the Region field will be included in the partner profile.

4. Click the Play icon to run the application to verify the change.

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5. Verify the change. Notice that custom region information is now added to the partner profile.
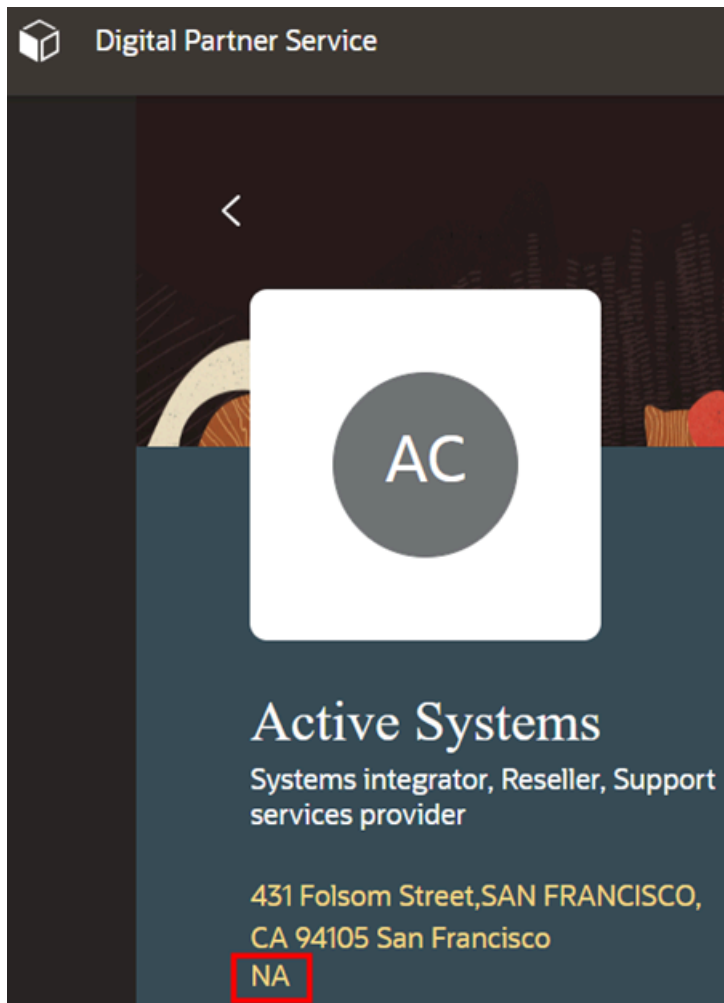
Add an Attribute to the Partner Inquiry Page

In this example, let's look at adding the Job Title field to the partner inquiry page. The Job Title field (JobTitle) is a standard attribute of the Lead object.

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In VBCS, complete these steps:

1. Navigate to Web Applications > partnerfinder > Flows > partner-finder > partner-finder-profile.
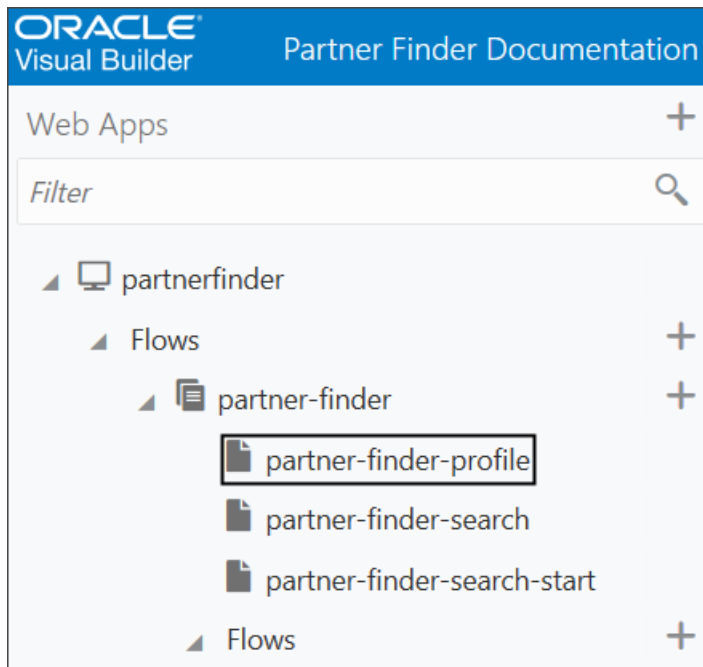
2. Click the Variables and Types icon (x) > Types tab > LeadType.
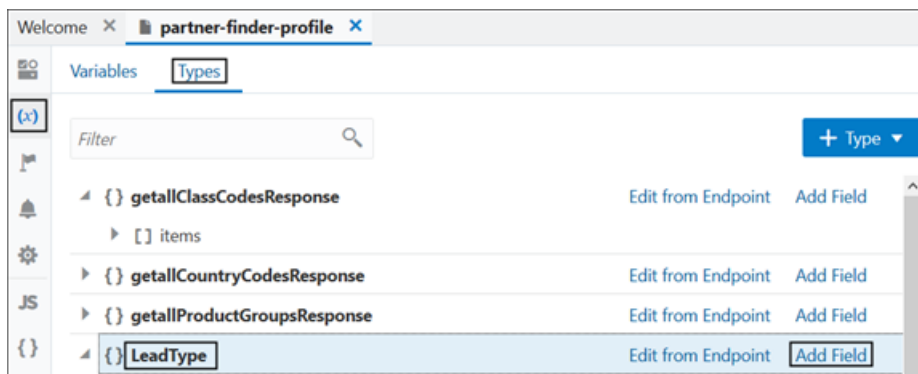
3. Add the Job Title field (JobTitle) to the type (LeadType) which is used for partner inquiry.

4. Click the Designer icon, then the Code button, to add the new field to the partner inquiry section (part of the partner profile page). Add this code:

```
<oj-input-text id="odps-pf-profile-contact-form-jobtitle" label-
hint="[[ $application.translations.app.contactform_jobtitle_placeholder ]]"
value="{{ $variables.newLead.JobTitle }}" display-options.validator-hint="none" >
</oj-input-text>
```


5. Add the new field label to the string repository file using this code:

```
"contactform_jobtitle_placeholder": "Job Title",
"@contactform_jobtitle_placeholder": {
"description": "Contact form jobtitle place holder"
```

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```
},
```
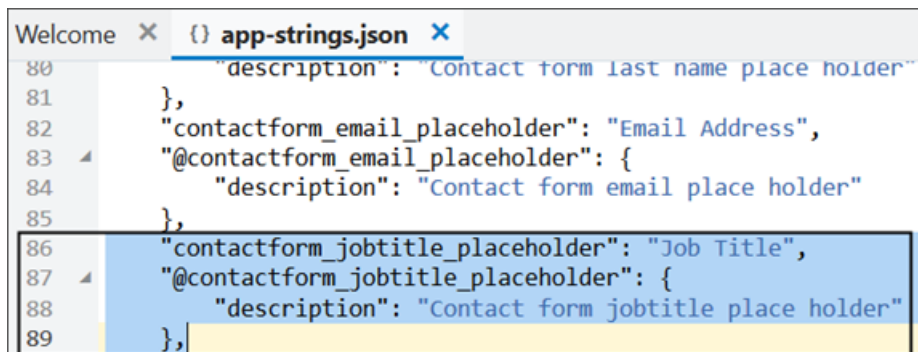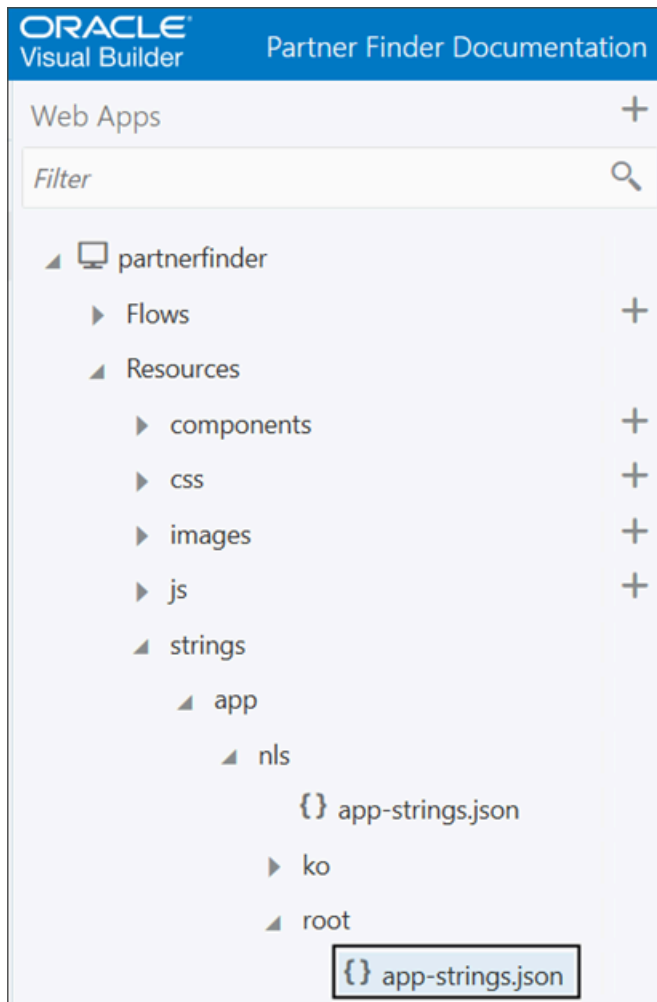

6. Click the Play icon to run the application to verify the change.

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7. Verify the change. Notice that the Job Title field is now included in the partner inquiry page.

Provide your details for Active Systems to contact you

First Name *

Last Name *

Email Address *

Job Title

Contact Number *

Country Code ▾   Contact Number

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6 Life Cycle Management

Determine Template Version

This topic describes how to determine the version of the Oracle Partner Finder template your application was based on, in Oracle Visual Builder.

Partner Finder provides templates for you to create your application. Additional templates may be provided with each version, and in some situations, you might want to know the version of the template that your application was based on.

To determine the version of your template:

1. Sign in to Oracle Visual Builder.
2. Open your Partner Finder application.
3. Click **Web Applications**.
4. In **Web Apps**, click `dcs`.
5. Click the **JS** icon (Functions).

   The functions appears.
6. The first line of the functions will look similar to the following:

   ```
   /* Oracle Partner Finder Template 20B 1.1.1 */
   ```

   In this example, the **20B 1.1.1** indicates the version of the template that you're using.