Oracle

Sales Cloud

Getting Started with High Tech and Manufacturing Implementation

Release 12
# Contents

## Preface

1 ## About This Guide

   1. Audience and Scope
   2. Related Guides

2 ## Overview

   1. Setup Tasks List

3 ## Setting Up Account Plans

   1. Activating Global Search for Account Plans

4 ## Configuring Roles

   1. Configuring Roles: Overview
   2. Creating Job Roles
   3. Creating Resource Roles
   4. Provisioning Rules for Roles
   5. Assigning Resource Roles to Users

5 ## Configuring Objects

   1. Duplicating Layouts
   2. Configuring Security Policies

6 ## Creating Triggers

   1. Updating Deal Size
   2. Setting Up Opportunity Relationships

7 ## Configuring Analytics

   1. Enabling Sales Infolets Page
   2. Adding Infolets to Sales Infolets Page
8 Configuring Sales Methodology

Creating Profile Option for Bid and Project

Setting Default Sales Method for Opportunity Types
Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon in the global header. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

Using Applications Help

Watch: This video tutorial shows you how to find help and use help features.

Additional Resources

- Community: Use Oracle Applications Customer Connect to get information from experts at Oracle, the partner community, and other users.
- Guides and Videos: Go to the Oracle Help Center to find guides and videos.
- Training: Take courses on Oracle Cloud from Oracle University.

Documentation Accessibility

For information about Oracle's commitment to accessibility, see the Oracle Accessibility Program.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 About This Guide

Audience and Scope

This guide is intended for anyone who is involved in setting up the High Tech and Manufacturing industry solution.

You must perform the implementation steps covered in this guide either while implementing or after implementing Oracle Sales Cloud. The guide does not cover the implementation activities for Oracle Sales Cloud.

If you want to set up and work with the additional features of Oracle Sales Cloud, see Oracle Sales Cloud documentation on Oracle Help Center at https://docs.oracle.com.

Related Guides

You can refer to the following related guides to understand more about the implementation tasks covered in this guide.

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud Getting Started with Your Implementation</td>
<td>Describes how to set up a sales automation solution in Oracle Sales Cloud using a case study to describe concepts and procedures.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Sales</td>
<td>Describes how to configure and set up Sales.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Getting Started with Oracle Sales Cloud Customizations</td>
<td>Introduces you to simple, common customizations of Oracle Sales Cloud using tools, such as Application Composer and Page Composer.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Customizing Sales</td>
<td>Describes how to use tools to customize and extend Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Getting Started with Partner Relationship Management</td>
<td>Provides the basic setup instructions for getting started with Oracle Partner Relationship Management.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Groovy Scripting Reference for Application Composer</td>
<td>Explains the basics of using the Groovy scripting language to enhance your Oracle Sales Cloud offerings.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Understanding File-Based Data Import and Export</td>
<td>Describes how to import legacy and other data into Oracle Sales Cloud using File-Based Data Import.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Securing Sales Cloud</td>
<td>Describes how to enable user access to Sales Cloud functions and data.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Security Reference</td>
<td>Provides a reference to roles, role hierarchies, privileges, and policies as delivered for the Sales offering.</td>
</tr>
</tbody>
</table>
Related Topics

- Oracle Help Center
2 Overview

Setup Tasks List

This topic provides a summary of the tasks that you perform to set up Oracle Sales Cloud for High Tech and Manufacturing. The following table lists the sequence of the tasks and the respective work area. The tasks are categorized based on the customization tools or composers that you must use to implement, customize, and extend your high tech and manufacturing application.

<table>
<thead>
<tr>
<th>Setup Activity</th>
<th>Work Area and Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setting up account plans</td>
<td>Setup and Maintenance: Manage Search View Object</td>
</tr>
<tr>
<td>Configuring roles</td>
<td>Tools: Security Console</td>
</tr>
<tr>
<td></td>
<td>Setup and Maintenance:</td>
</tr>
<tr>
<td></td>
<td>• Manage Resource Roles</td>
</tr>
<tr>
<td></td>
<td>• Manage HCM Role Provisioning Rules</td>
</tr>
<tr>
<td></td>
<td>My Team: Manage Users</td>
</tr>
<tr>
<td>Configuring objects</td>
<td>Application Composer: Objects</td>
</tr>
<tr>
<td>Creating triggers</td>
<td>Application Composer: Objects</td>
</tr>
<tr>
<td>Configuring analytics</td>
<td>Setup and Maintenance: Structure</td>
</tr>
<tr>
<td></td>
<td>Settings and Actions: Customize Work Area Pages</td>
</tr>
<tr>
<td>Configuring sales methodology</td>
<td>Setup and Maintenance:</td>
</tr>
<tr>
<td></td>
<td>• Manage Standard Lookups</td>
</tr>
<tr>
<td></td>
<td>• Manage Profile Options</td>
</tr>
<tr>
<td></td>
<td>• Manage Opportunity Profile Options</td>
</tr>
</tbody>
</table>

Perform the steps provided in this guide in conjunction with or after completing the implementation steps described in the Oracle Sales Cloud Getting Started with Your Implementation guide.
3 Setting Up Account Plans

Activating Global Search for Account Plans

Oracle Sales Cloud global and work area searches enable you to search within and across application objects, such as opportunities, leads, and accounts. Global search must be activated for account plan.

To activate global search for account plans:

1. Sign in to Oracle Sales Cloud using administrator role.
2. Navigate to the Setup and Maintenance work area.
3. Search for Manage Search View Object task and select it.
4. On the row containing __ORAHT__AccountPlan_cPVO, do not click the link but click any other cell in that row.
5. Click Activate.

This activates the Account Plan Search View Object in global search.

6. Click __ORAHT__AccountPlan_cPVO link in the table.
7. Edit and specify the following:
   - Category Name: Account Plan.
   - Title: Plan Name
   - Fixed Content: Plan Status
   - Body: Plan Visits
   - Frequency Type: Hourly.

8. Click Save and Close.

Global search for account plan is now active.

Related Topics

- Enabling and Configuring Search Setup Overview
4 Configuring Roles

Configuring Roles: Overview

Roles must be created to provide users privilege to protected application data and functions. You must configure roles for your instance of the application.

The Security Console must be used for a few of the configuration steps. Before you use the Security Console, you must initialize the Oracle Fusion Applications Security tables with existing user and role information.

You must configure the following roles:

- Sales
  - High Tech and Manufacturing Sales Administrator
  - High Tech and Manufacturing Sales Manager
  - High Tech and Manufacturing Sales Representative
- Channel
  - High Tech and Manufacturing Channel Account Manager
  - High Tech and Manufacturing Channel Sales Manager
  - High Tech and Manufacturing Channel Operations Manager
- Partner
  - High Tech and Manufacturing Partner Administrator
  - High Tech and Manufacturing Partner Sales Manager
  - High Tech and Manufacturing Partner Sales Representative

The following configuration steps must be completed for each role:

1. Create job role
2. Create resource role
3. Provision rules for role
4. Assign resource roles to users

Related Topics
- Importing Users and Roles into Applications Security: Procedure

Creating Job Roles

Job roles refer to the job functions which users perform in an organization. Job roles provide users with the permissions they require to perform activities specific to their job.
You must create job roles which are specific to the automotive industry. You can assign job roles directly to users.

You must create the following job roles:

- **Sales**
  - High Tech and Manufacturing Sales Administrator
  - High Tech and Manufacturing Sales Manager
  - High Tech and Manufacturing Sales Representative
  - High Tech and Manufacturing Sales VP

- **Channel**
  - High Tech and Manufacturing Channel Account Manager
  - High Tech and Manufacturing Channel Sales Manager
  - High Tech and Manufacturing Channel Operations Manager

- **Partner**
  - High Tech and Manufacturing Partner Administrator
  - High Tech and Manufacturing Partner Sales Manager
  - High Tech and Manufacturing Partner Sales Representative

### Creating Job Roles

You must complete the following tasks to create job roles:

1. Sign in to Oracle Sales Cloud using the administrator role.
2. Navigate to **Security Console** in Tools.
3. Navigate to Roles tab in the Administration subtab.
4. Specify the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Prefix</th>
<th>Suffix</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copied Role Name</td>
<td>HighTech and Manufacturing</td>
<td>N/A</td>
</tr>
<tr>
<td>Copied Role Code</td>
<td>HITECH_</td>
<td>N/A</td>
</tr>
</tbody>
</table>

5. Select the following check boxes:
   - Enable edit of data security policies
   - Enable edit of user role membership

6. Click **Save** and navigate to the Roles subtab.
7. Search the source role code of the role for which you want to create the job role from the following table.

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Source Role Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Tech and Manufacturing Sales Administrator</td>
<td>ORA_ZBS_SALES_ADMINISTRATOR_JOB</td>
</tr>
</tbody>
</table>
### Chapter 4

**Configuring Roles**

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Source Role Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Tech and Manufacturing Sales Manager</td>
<td>ORA_ZBS_SALES_MANAGER_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Sales Representative</td>
<td>ORA_ZBS_SALES_REPRESENTATIVE_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing VP</td>
<td>ORA_ZBS_SALES_VP_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Channel Account Manager</td>
<td>ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Channel Sales Manager</td>
<td>ORA_ZPM_CHANNEL_SALES_MANAGER_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Channel Operations Manager</td>
<td>ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Partner Administrator</td>
<td>ORA_ZPM_PARTNER_ADMINISTRATOR_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Partner Sales Manager</td>
<td>ORA_ZPM_PARTNER_SALES_MANAGER_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Partner Sales Representative</td>
<td>ORA_ZPM_PARTNER_SALES_REPRESENTATIVE_JOB</td>
</tr>
</tbody>
</table>

8. In the Search Results region, click drop-down list icon and select **Copy Role**.
9. Select Copy top role and inherited role and click **Copy Role** in the Copy Option dialog box.
10. On the Copy Role: Basic Information page provide the information for the role you want to create job role for as mentioned in the following table:

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Role Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Tech and Manufacturing Sales Administrator</td>
<td>HITECH_SALES_ADMIN_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Sales Manager</td>
<td>HITECH_SALES_MANAGER_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Sales Representative</td>
<td>HITECH_SALES_REP_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing VP</td>
<td>HITECH_SALES_VP_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Channel Account Manager</td>
<td>HITECH_CHANNEL_ACCOUNT_MANAGER_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Channel Sales Manager</td>
<td>HITECH_CHANNEL_SALES_MANAGER_JOB</td>
</tr>
</tbody>
</table>
### Configuring Roles

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Role Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Tech and Manufacturing Channel Operations Manager</td>
<td>HITECH_CHANNEL_OPERATIONS_MANAGER_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Partner Administrator</td>
<td>HITECH_PARTNER_ADMINISTRATOR_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Partner Sales Manager</td>
<td>HITECH_PARTNER_SALES_MANAGER_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Partner Sales Representative</td>
<td>HITECH_PARTNER_SALES_REF_JOB</td>
</tr>
</tbody>
</table>

11. Click **Summary and Impact Report** train stop and click **Submit and Close**.

The job roles have been created. You can also use this procedure to create additional job roles.

### Related Topics
- Role Types: Explained
- Copying Sales Roles: Points to Consider
- Methods of Creating Users: Explained

### Creating Resource Roles

Resource roles describe the role a user plays as an individual or within a resource team in the organization. You must create resource roles for sales users.

The following resource roles must be created:

- Sales
  - High Tech and Manufacturing Sales Administrator
  - High Tech and Manufacturing Sales Manager
  - High Tech and Manufacturing Sales Representative
  - High Tech and Manufacturing Sales VP
- Channel
  - High Tech and Manufacturing Channel Account Manager
  - High Tech and Manufacturing Channel Sales Manager
  - High Tech and Manufacturing Channel Operations Manager
- Partner
  - High Tech and Manufacturing Partner Administrator
  - High Tech and Manufacturing Partner Sales Manager
Creating Resource Roles

You must complete the following steps to create resource roles:

1. Sign in to Oracle Sales Cloud using the administrator role.
2. Navigate to the Setup and Maintenance work area.
3. Search for Manage Resource Roles task and select it.
4. Click Create on the Search Results region.
5. On the Create Role page, provide the following information for each resource role:

<table>
<thead>
<tr>
<th>Role</th>
<th>Fields</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Tech and Manufacturing Sales Administrator</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Sales Administrator</td>
</tr>
<tr>
<td></td>
<td>Role Code</td>
<td>HIGH_TECH_SALES_ADMIN</td>
</tr>
<tr>
<td></td>
<td>Role Type</td>
<td>Sales</td>
</tr>
<tr>
<td></td>
<td>Role Option</td>
<td>Administrator</td>
</tr>
<tr>
<td>High Tech and Manufacturing Sales Manager</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Sales Manager</td>
</tr>
<tr>
<td></td>
<td>Role Code</td>
<td>HITECH_SALES_MANAGER</td>
</tr>
<tr>
<td></td>
<td>Role Type</td>
<td>Sales</td>
</tr>
<tr>
<td></td>
<td>Role Option</td>
<td>Manager</td>
</tr>
<tr>
<td>High Tech and Manufacturing Sales Representative</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Sales Representative</td>
</tr>
<tr>
<td></td>
<td>Role Code</td>
<td>HITECH_SALES_REP</td>
</tr>
<tr>
<td></td>
<td>Role Type</td>
<td>Sales</td>
</tr>
<tr>
<td></td>
<td>Role Option</td>
<td>Member</td>
</tr>
<tr>
<td>High Tech and Manufacturing Sales VP</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Sales VP</td>
</tr>
<tr>
<td></td>
<td>Role Code</td>
<td>HITECH_SALES_VP</td>
</tr>
<tr>
<td></td>
<td>Role Type</td>
<td>Sales</td>
</tr>
<tr>
<td></td>
<td>Role Option</td>
<td>Manager</td>
</tr>
<tr>
<td>High Tech and Manufacturing Channel Account Manager</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Channel Account Manager</td>
</tr>
<tr>
<td></td>
<td>Role Code</td>
<td>HITECH_CHANNEL_ACCOUNT_MANAGER</td>
</tr>
<tr>
<td></td>
<td>Role Type</td>
<td>Channel Sales</td>
</tr>
<tr>
<td></td>
<td>Role Option</td>
<td>Manager</td>
</tr>
<tr>
<td>Role</td>
<td>Fields</td>
<td>Value</td>
</tr>
<tr>
<td>------------------------------------------</td>
<td>-------------------------</td>
<td>--------------------------------------------</td>
</tr>
<tr>
<td>High Tech and Manufacturing Channel Sales Manager</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Channel Sales Manager</td>
</tr>
<tr>
<td></td>
<td>Role Code</td>
<td>HITECH_CHANNEL_SALES_MANAGER</td>
</tr>
<tr>
<td></td>
<td>Role Type</td>
<td>Channel Sales</td>
</tr>
<tr>
<td></td>
<td>Role Option</td>
<td>Manager</td>
</tr>
<tr>
<td>High Tech and Manufacturing Channel Operations Manager</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Channel Operations Manager</td>
</tr>
<tr>
<td></td>
<td>Role Code</td>
<td>HITECH_CHANNEL_OPERATIONS_MANAGER</td>
</tr>
<tr>
<td></td>
<td>Role Type</td>
<td>Channel Sales</td>
</tr>
<tr>
<td></td>
<td>Role Option</td>
<td>Manager</td>
</tr>
<tr>
<td>High Tech and Manufacturing Partner Administrator</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Partner Administrator</td>
</tr>
<tr>
<td></td>
<td>Role Code</td>
<td>HITECH_PARTNER_ADMINISTRATOR</td>
</tr>
<tr>
<td></td>
<td>Role Type</td>
<td>Partner</td>
</tr>
<tr>
<td></td>
<td>Role Option</td>
<td>Administrator and Manager</td>
</tr>
<tr>
<td>High Tech and Manufacturing Partner Sales Manager</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Partner Sales Manager</td>
</tr>
<tr>
<td></td>
<td>Role Code</td>
<td>HITECH_PARTNER_SALES_MANAGER</td>
</tr>
<tr>
<td></td>
<td>Role Type</td>
<td>Partner</td>
</tr>
<tr>
<td></td>
<td>Role Option</td>
<td>Manager</td>
</tr>
<tr>
<td>High Tech and Manufacturing Partner Sales Representative</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Partner Sales Representative</td>
</tr>
<tr>
<td></td>
<td>Role Code</td>
<td>HITECH_PARTNER_SALES_REP</td>
</tr>
<tr>
<td></td>
<td>Role Type</td>
<td>Partner</td>
</tr>
<tr>
<td></td>
<td>Role Option</td>
<td>Member</td>
</tr>
</tbody>
</table>

6. Click **Save and Close**.

The resource roles have been created. You can also use this procedure to create additional resource roles.

**Related Topics**

- Role Types: Explained
- Copying Sales Roles: Points to Consider
- Methods of Creating Users: Explained
Provisioning Rules for Roles

Rules must be provisioned for roles to map resource roles to the required job roles. You must provision roles to users by creating rules manually.

You must provision rules for the following roles:

- **Sales**
  - High Tech and Manufacturing Sales Administrator
  - High Tech and Manufacturing Sales Manager
  - High Tech and Manufacturing Sales Representative
  - High Tech and Manufacturing Sales VP
- **Channel**
  - High Tech and Manufacturing Channel Account Manager
  - High Tech and Manufacturing Channel Sales Manager
  - High Tech and Manufacturing Channel Operations Manager
- **Partner**
  - High Tech and Manufacturing Partner Administrator
  - High Tech and Manufacturing Partner Sales Manager
  - High Tech and Manufacturing Partner Sales Representative

Provisioning Rules

You must complete the following steps to provision rules:

1. Sign in to Oracle Sales Cloud using the administrator role.
2. Navigate to the **Setup and Maintenance** work area.
3. Search for **Manage HCM Role Provisioning Rules** task and select it.
4. Click **Create** in the Search Results region.
5. On the Create Role Mapping page, complete the following steps:
   a. Enter the Mapping Name of your choice.
   b. In the Conditions region, select the following resource roles and set their **HR Assignment Status** as Active:
      - High Tech and Manufacturing Sales Administrator
      - High Tech and Manufacturing Sales Manager
      - High Tech and Manufacturing Sales Representative
      - High Tech and Manufacturing Sales VP
      - High Tech and Manufacturing Channel Account Manager
      - High Tech and Manufacturing Channel Sales Manager
      - High Tech and Manufacturing Channel Operations Manager
c. In the Associated Roles region, click **Add Roles**.

d. Search for the job role and use one of the following values in the Search and Select: Role Name dialog box:

<table>
<thead>
<tr>
<th>Role</th>
<th>Fields</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Tech and Manufacturing Sales Administrator</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Sales Administrator</td>
</tr>
<tr>
<td></td>
<td>Common Role Name</td>
<td>HITECH_ SALES_ ADMIN_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Sales Manager</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Sales Manager</td>
</tr>
<tr>
<td></td>
<td>Common Role Name</td>
<td>HITECH_ SALES_ MANAGER_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Sales Representative</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Sales Representative</td>
</tr>
<tr>
<td></td>
<td>Common Role Name</td>
<td>HITECH_ SALES_REP_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Sales VP</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Sales VP</td>
</tr>
<tr>
<td></td>
<td>Common Role Name</td>
<td>HITECH_ SALES_VP_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Channel Account Manager</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Channel Account Manager</td>
</tr>
<tr>
<td></td>
<td>Common Role Name</td>
<td>HITECH_ CHANNEL_ ACCOUNT_ MANAGER_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Channel Sales Manager</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Channel Sales Manager</td>
</tr>
<tr>
<td></td>
<td>Common Role Name</td>
<td>HITECH_ CHANNEL_ SALES_ MANAGER_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Channel Operations Manager</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Channel Operations Manager</td>
</tr>
<tr>
<td></td>
<td>Common Role Name</td>
<td>HITECH_ CHANNEL_ OPERATIONS_ MANAGER_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Partner Administrator</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Partner Administrator</td>
</tr>
<tr>
<td></td>
<td>Common Role Name</td>
<td>HITECH_ PARTNER_ ADMINISTRATOR_ JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Partner Sales Manager</td>
<td>Role Name</td>
<td>High Tech and Manufacturing Partner Sales Manager</td>
</tr>
<tr>
<td></td>
<td>Common Role Name</td>
<td>HITECH_ PARTNER_ SALES_ MANAGER_JOB</td>
</tr>
<tr>
<td>High Tech and Manufacturing Partner Sales Representative</td>
<td>Role Name</td>
<td>High Tech and Manufacturing partner Sales Representative</td>
</tr>
</tbody>
</table>
e. Select the **Autoprovision** option for the job role that you have added.

6. **Click Save and Close.**

Rules have been provisioned for the roles. You can use this procedure to provision rules for additional roles.

**Related Topics**

- Provisioning Job and Abstract Roles to Users: Explained

---

### Assigning Resource Roles to Users

Resources roles must be assigned to users to provide them access to application data and functions pertaining to these roles. The application determines the job role and duty role of a user depending on the resource role assigned to the user.

**Assigning Resource Roles**

You must complete the following steps to assign resource roles:

1. Sign in to Oracle Sales Cloud using the administrator role.
2. Select **Manage Users** under My Team in the Navigator.
3. Search of the name of the user you want to assign a resource role to in Keywords field.
4. Click the name of the user you want to assign a resource role to from the search result.

**Note:** You can click **Create** on the Search Results to add a new user role.

5. Select the resource role you want to assign the user in the Resource Information region.
6. **Click Autoprovision Roles** to immediately provision roles to the user.

**Note:** You can click **Add Roles** in the Roles region to manually provision the job role to the user. The Role Request in Last 30 Days region also provides information regarding the roles automatically assigned to the user.

7. **Click Save and Close.**

The resource role has been assigned to the user.

**Related Topics**

- Creating Application Users for Oracle Sales Cloud
5 Configuring Objects

Duplicating Layouts

You must duplicate layouts of a page for multiple users using application composer.

For example, a sales manager has the privilege to view certain fields on an opportunity record, which other sales team members do not. Similarly, certain fields may be displayed for an open opportunity and not for a closed opportunity.

You can dynamically control the display of page layouts based on:

- Roles or privileges of the users
- Groovy expression
- Type of record

For more information and examples on how you can use page layout, see the Oracle Sales Cloud Customizing Sales guide.

Predefined Layouts

To duplicate these pages, you must:

1. Duplicate the layouts provided.
2. Add the provided groovy script.
3. Associate the pages with specific Oracle Sales Cloud job roles.

The following table lists the pages you must duplicate. The Duplicating Layouts section provides steps to duplicate the required pages.

> **Note:** Duplicate the layouts in the sequence provided in the following table.

<table>
<thead>
<tr>
<th>Object</th>
<th>Application</th>
<th>Object Type</th>
<th>Layout Type</th>
<th>Layout Name</th>
<th>Roles</th>
<th>Advanced Expressions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Common</td>
<td>Standard</td>
<td>Details Page</td>
<td>Manufacturing Layout</td>
<td>Any</td>
<td>N/A</td>
</tr>
<tr>
<td>Account Plan</td>
<td>Common</td>
<td>Custom</td>
<td>Creation Page</td>
<td>Manufacturing Layout</td>
<td>Any</td>
<td>N/A</td>
</tr>
<tr>
<td>Account Plan</td>
<td>Common</td>
<td>Custom</td>
<td>Details Page</td>
<td>Manufacturing Layout for Sales Manager and Admin</td>
<td>High Tech and Manufacturing Sales Administrator</td>
<td>N/A</td>
</tr>
<tr>
<td>Object</td>
<td>Application</td>
<td>Object Type</td>
<td>Layout Type</td>
<td>Layout Name</td>
<td>Roles</td>
<td>Advanced Expressions</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------</td>
<td>---------------</td>
<td>----------------</td>
<td>-------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
<td>--------------------------------------------</td>
</tr>
<tr>
<td>Account Plan</td>
<td>Common</td>
<td>Custom</td>
<td>Details Page</td>
<td>Manufacturing Layout for Sales Representative</td>
<td>High Tech and Manufacturing Sales Representative</td>
<td>N/A</td>
</tr>
<tr>
<td>Opportunity</td>
<td>Sales</td>
<td>Standard</td>
<td>Creation Page</td>
<td>Manufacturing Layout for Opportunity</td>
<td>Any</td>
<td>N/A</td>
</tr>
<tr>
<td>Opportunity</td>
<td>Sales</td>
<td>Standard</td>
<td>Creation Page</td>
<td>Standard Layout</td>
<td>High Tech and Manufacturing Partner Administrator</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>High Tech and Manufacturing Partner Sales Manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>High Tech and Manufacturing Partner Sales Representative</td>
<td></td>
</tr>
<tr>
<td>Opportunity</td>
<td>Sales</td>
<td>Standard</td>
<td>Details Page</td>
<td>Manufacturing Layout for Bid Opportunity</td>
<td>Any</td>
<td>if(__ORAHT__OpportunityType_c=='ORA_AHT_BID') return true</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>High Tech and Manufacturing Partner Sales Representative</td>
<td></td>
</tr>
<tr>
<td>Opportunity</td>
<td>Sales</td>
<td>Standard</td>
<td>Details Page</td>
<td>Manufacturing Layout for Project Opportunity</td>
<td>Any</td>
<td>if(__ORAHT__OpportunityType_c=='ORA_AHT_PROJECT') return true</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>High Tech and Manufacturing Partner Sales Representative</td>
<td></td>
</tr>
<tr>
<td>Opportunity</td>
<td>Sales</td>
<td>Standard</td>
<td>Details Page</td>
<td>Standard Layout</td>
<td>High Tech and Manufacturing Partner Administrator</td>
<td>N/A</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>High Tech and Manufacturing Partner Sales Manager</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>High Tech and Manufacturing Partner Sales Representative</td>
<td></td>
</tr>
</tbody>
</table>
Duplicating Layouts

Perform the following steps to duplicate pages and assigning roles for each object listed in the preceding table using the values specified:

1. Sign in to Oracle Sales Cloud using the administrator role.
2. Ensure that you are in an active sandbox.
3. Navigate to the Application Composer.
4. Select the application from the Application list for the object you want to create a duplicate layout.
5. Expand Standard Objects.
6. Expand the object for which you want to create duplicate layout.
7. Click Pages.
8. On the Simplified Pages tab, perform the following steps for the correct layout type, as provided in the preceding table.
   a. Select All layouts from the Layout Status drop-down list.
   b. Select the layout name specified in the preceding table in the Layout Name column.
   c. Select Actions - Duplicate Layout.
   d. On the Duplicate Layout dialog box, enter a New Layout Name for each page.
   e. Click Save and Close.
   f. Click the drop-down list icon in the Role field corresponding to the duplicate page layout you created.
      The Select: Roles dialog box opens.
   g. Select Specific Role for Roles.
   h. Select the roles you want to associate with the duplicated layout from the Available Roles list, and click OK.
   i. If the object requires an expression, click the icon in the Advanced Expression column corresponding to the duplicated page layout.
   j. On the Advanced Expression dialog box, enter the expression as given in the preceding table, and click OK.
9. Publish the sandbox.

The page layout has been duplicated. Repeat the preceding steps to duplicate page layouts of the remaining objects.

Related Topics

- Dynamic Page Layouts: Explained
- Groovy Scripting: Explained
- Groovy Scripting: Examples
- Using Groovy Scripting: Examples
- Setting Up Sandboxes: Procedure

Configuring Security Policies

Security policies define who can access data at run time. When a custom object is created, access is only granted to the default duty role specified by the application. Security policies must be set for users you created.
The users you created must be provided access to the following custom objects:

- Account Plan
- Earlier Plan
- Plan Account
- Plan Activity
- Plan Contact
- Plan Lead
- Plan Opportunity
- Plan Team

User-Based Access to Custom Objects

Users must be provided the following levels of access to the custom objects:

<table>
<thead>
<tr>
<th>User</th>
<th>Create</th>
<th>View</th>
<th>Update</th>
<th>Delete</th>
<th>View All</th>
<th>Update All</th>
<th>Delete All</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Tech Sales Administrator</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>High Tech Sales Manager</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>High Tech Sales Representative</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>High Tech Sales VP</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Procedure to Configure Security Policies for Custom Objects

You must use the following steps to configure the security policy for the users you created:

1. Sign in to Oracle Sales Cloud using the administrator role.
2. Ensure that you are in an active sandbox.
3. Navigate to the Application Composer.
4. Select Common from the Application list.
5. Expand Custom Objects and expand the custom object you want to configure security policies for.
6. Click Security.
7. On the Define Policies page, select the permissions as mentioned in the preceding table for each role.
8. Click Save and Close.
9. Publish the sandbox.

Security policies have been configured for the users you created.
6 Creating Triggers

Updating Deal Size

You must create a trigger to automatically calculate and update the size of a deal registration before it is submitted for the channel account manager’s approval. For example, if you add one or more products to a deal, the deal size automatically updates the total value of the deal.

The deal size can be updated by the partner or anyone who you provide permissions to do so.

To create the trigger:

1. Sign in to Oracle Sales Cloud using the administrator role.
2. Ensure that you are in an active sandbox.
3. Navigate to the Application Composer.
4. Select Sales from the Application list.
5. Expand Standard Objects.
7. Expand Deal Products and click Server Scripts.
8. On the Triggers tab, select Action-Add in Object Triggers.
9. On the Create Object Trigger page, specify the following for the three triggers:

   a. **Trigger:** Before Insert in Database.
      
      **Trigger Name:** CopyDealProductAmountToDealSize_BeforeInsert
      
      In **Trigger Definition**, paste the following script from this document and click Save and Close:
      
      ```java
      if(isAttributeChanged('Amount') && Deal!=null)
      {
      def dealProd=Deal?.DealProduct
      def dealSize = dealProd.sum('Amount')
      Deal.setAttribute('DealSize', nvl(dealSize,0))
      }
      ```

   b. **Trigger:** Before Update in Database
      
      **Trigger Name:** CopyDealProductAmountToDealSize_BeforeUpdate
      
      In **Trigger Definition**, paste the following script from this document and click Save and Close:
      
      ```java
      if(isAttributeChanged('Amount'))
      {
      def dealProd=Deal?.DealProduct
      def dealSize = dealProd.sum('Amount')
      Deal.setAttribute('DealSize', nvl(dealSize,0))
      }
      ```

   c. **Trigger:** Before Remove
      
      **Trigger Name:** CopyDealProductAmountToDealSize_BeforeRemove
      
      In **Trigger Definition**, paste the following script from this document and click Save and Close:
      
      ```java
      ```
Oracle Sales Cloud
Getting Started with High Tech and Manufacturing
Implementation

Chapter 6
Creating Triggers

10. Publish the sandbox.

The trigger has been created to automatically update the deal size on a deal registration when a new product is added.

Related Topics

• Oracle Database PL/SQL Language Reference
• Groovy Scripting: Explained
• Setting Up Sandboxes: Procedure
• Configuring Object Workflows: Worked Example

Setting Up Opportunity Relationships

You must create triggers to set up the relationships between the different opportunity types.

The triggers must created to allow the sales team to associate different opportunities of similar or different types in a parent and child relationship. The triggers allow the sales team to create opportunity hierarchies, where opportunities can be associated with another as a grandparent or a grandchild.

To create the triggers:

1. Sign in to Oracle Sales Cloud using the administrator role.
2. Ensure that you are in an active sandbox.
3. Navigate to the Application Composer.
4. Select Sales from the Application list.
5. Expand Standard Objects.
7. Click Server Scripts.
8. On the Triggers tab, select Action-Add in Object Triggers.
9. On the Create Object Trigger page, specify the following:

   a. Trigger: Before Insert in Database.
   b. Trigger Name: HierarchyValidation_BeforeInsert.
   c. In Trigger Definition, paste the following script and click Save and Close:

```py
def subOptyes = Opportunity___ORAHT__ProjectToBid_Tgt
def parentOpty = __ORAHT__ParentProject_Obj_c
def subOptyRow = null
if(__ORAHT__ParentProject_Id_c != null && __ORAHT__AssociationFromDCL_c == 'Y')
{
  // If parent Opportunity of a bid is set as a bid opportunity, an error is thrown
  if (__ORAHT__OpportunityType_c == 'ORA_AHT_BID' && parentOpty?.__ORAHT__OpportunityType_c == 'ORA_AHT_BID')
  {
    adf.error.addAttribute('__ORAHT__ParentProject_c')
  }
}
```
throw new oracle.jbo.ValidationException(adf.util.__ORAHT__getMessage('AHT_BID_CANNOT_HAVE_BID_PARENT'));
}

// If parent Opportunity of a project is set as a project or bid opportunity, an error is thrown
else if (__ORAHT__OpportunityType_c == 'ORA_AHT_PROJECT' && parentOpty?.__ORAHT__OpportunityType_c != 'ORA_AHT_REGULAR')
{
    adf.error.addAttribute('__ORAHT__ParentProject_c')
    throw new oracle.jbo.ValidationException(adf.util.__ORAHT__getMessage('AHT_PROJECT_REQ_STD_PARENT'));
}

// If parent Opportunity of a standard is set as a project or bid opportunity, an error is thrown
else if(__ORAHT__OpportunityType_c == 'ORA_AHT_REGULAR' && parentOpty?.__ORAHT__OpportunityType_c != 'ORA_AHT_REGULAR')
{
    adf.error.addAttribute('__ORAHT__ParentProject_c')
    throw new oracle.jbo.ValidationException(adf.util.__ORAHT__getMessage('AHT_STD_REQ_STD_OR_PRJ_CHILD'));
}
else if(Opportunity_Id___ORAHT__ProjectToBid != null && __ORAHT__AssociationFromSubtab_c == 'Y')
{
    // If non bid opportunity is added as a child of project, an error is thrown
    if (__ORAHT__OpportunityType_c != 'ORA_AHT_BID' && Opportunity___ORAHT__ProjectToBid_Src?.__ORAHT__OpportunityType_c == 'ORA_AHT_PROJECT')
    {
        throw new oracle.jbo.ValidationException(adf.util.__ORAHT__getMessage('AHT_BID_CHILD_OF_PROJECT_ERROR'));
    }
}

b. Trigger: Before Update in Database

Trigger Name: HierarchyValidation_BeforeUpdate

In Trigger Definition, paste the following script and click Save and Close.

def subOpties = Opportunity___ORAHT__ProjectToBid_Tgt
def parentOpty = __ORAHT__ParentProject_Obj_c
def subOptyRow = null
boolean bFound = false
if (isAttributeChanged('__ORAHT__OpportunityType_c'))
{
    // If Opportunity Type is changed to Bid and that opportunity have child opportunity, an error is thrown.
    if(__ORAHT__OpportunityType_c == 'ORA_AHT_BID' && subOpties.hasNext())
    {
        throw new oracle.jbo.ValidationException(adf.util.__ORAHT__getMessage('AHT_BID_CANNOT_HAVE_CHILDREN'))
    }
    // If Opportunity Type is changed to Project or Standard and the Parent Opportunity is of type Project, an error is thrown
    else if (__ORAHT__OpportunityType_c == 'ORA_AHT_PROJECT' || __ORAHT__OpportunityType_c == 'ORA_AHT_REGULAR')
    {
        throw new oracle.jbo.ValidationException(adf.util.__ORAHT__getMessage('AHT_PARENT_PROJECT_ERROR'))
    }
    // If Opportunity Type is changed to Project and that opportunity have non-bid child opportunity, an error is thrown.
    else if (__ORAHT__OpportunityType_c == 'ORA_AHT_PROJECT')
    {
        while (subOpties.hasNext())
        {
            subOptyRow = subOpties.next();
            if (subOptyRow.__ORAHT__OpportunityType_c != 'ORA_AHT_BID')
            {
bFound = true
break
}
}
if( bFound=true)
throw new
oracle.jbo.ValidationException(adf.util.__ORAHT__getMessage('AHT_PROJECT_REQ_BID_CHILD'))
}
}
if(isAttributeChanged('__ORAHT__ParentProject_Id_c') && __ORAHT__ParentProject_Id_c != null &&
__ORAHT__AssociationFromDCL_c == 'Y')
{
    // If parent Opportunity of a bid is set as a bid opportunity, an error is thrown
    if (__ORAHT__OpportunityType_c == 'ORA_AHT_BID' && parentOpty?.__ORAHT__OpportunityType_c ==
'ORA_AHT_BID')
    {
        adf.error.addAttribute('__ORAHT__ParentProject_c')
        setAttribute('Opportunity_Id___ORAHT__ProjectToBid',
        getOriginalAttributeValue('Opportunity_Id___ORAHT__ProjectToBid'));
        throw new
        oracle.jbo.ValidationException(adf.util.__ORAHT__getMessage('AHT_BID_CANNOT_HAVE_BID_PARENT'));
    }
    // If parent Opportunity of a project is set as a project or bid opportunity, an error is thrown
    else if (__ORAHT__OpportunityType_c == 'ORA_AHT_PROJECT' &&
    parentOpty?.__ORAHT__OpportunityType_c != 'ORA_AHT_REGULAR')
    {
        adf.error.addAttribute('__ORAHT__ParentProject_c')
        setAttribute('Opportunity_Id___ORAHT__ProjectToBid',
        getOriginalAttributeValue('Opportunity_Id___ORAHT__ProjectToBid'));
        throw new
        oracle.jbo.ValidationException(adf.util.__ORAHT__getMessage('AHT_PROJECT_REQ_STD_PARENT'));
    }
    // If parent Opportunity of a standard is set as a project or bid opportunity, an error is thrown
    else if( __ORAHT__OpportunityType_c == 'ORA_AHT_REGULAR' &&
    parentOpty?.__ORAHT__OpportunityType_c != 'ORA_AHT_REGULAR')
    {
        adf.error.addAttribute('__ORAHT__ParentProject_c')
        setAttribute('Opportunity_Id___ORAHT__ProjectToBid',
        getOriginalAttributeValue('Opportunity_Id___ORAHT__ProjectToBid'));
        throw new
        oracle.jbo.ValidationException(adf.util.__ORAHT__getMessage('AHT_STD_REQ_STD_OR_PRJ_CHILD'));
    }
    // If non bid opportunity is added as a child of project, an error is thrown
    else if(isAttributeChanged('Opportunity_Id___ORAHT__ProjectToBid') &&
    Opportunity_Id___ORAHT__ProjectToBid != null && __ORAHT__AssociationFromSubtab_c == 'Y')
    {
        // If non bid opportunity is added as a child of project, an error is thrown
        if (__ORAHT__OpportunityType_c == 'ORA_AHT_BID' &&
        Opportunity___ORAHT__ProjectToBid_Src?.__ORAHT__OpportunityType_c == 'ORA_AHT_PROJECT')
        {
            setAttribute('__ORAHT__ParentProject_Id_c',getOriginalAttributeValue('__ORAHT__ParentProject_Id_c'));
            setAttribute('Opportunity_Id___ORAHT__ProjectToBid',__ORAHT__ParentProject_Id_c);
            throw new
            oracle.jbo.ValidationException(adf.util.__ORAHT__getMessage('AHT_BID_CHILD_OF_PROJECT_ERROR'));
        }
    }
}

10. Publish the sandbox.

Opportunity relationships have now been set up.
Related Topics

- Creating, Editing, and Deleting Notes in Oracle Sales Cloud for Consumer Goods Mobile
- Oracle Database PL/SQL Language Reference
- Groovy Scripting: Explained
- Setting Up Sandboxes: Procedure
- Configuring Object Workflows: Worked Example
7 Configuring Analytics

Enabling Sales Infolets Page

You must enable the sales infolets page. The sales infolets page contains business intelligent reports. We recommend that you use the sales infolets page instead of dashboards. You must enable the sales infolets page, if it is not enabled by default.

To enable the sales infolets page:

1. Sign in to Oracle Sales Cloud using the administrator role.
2. Ensure that you are in an active sandbox.
3. Select Structure from the Navigator menu.
4. Click Set System Options.
   - Set System Options page opens.
5. Enable Sales Infolets.
6. Click Save and Close.
7. Publish the sandbox.

The sales infolets page has now been enabled.

Related Topics

- Personalizing Infolets: Procedure
- Setting Up Sandboxes: Procedure

Adding Infolets to Sales Infolets Page

You must create infolets and then add business intelligence reports to each of the infolets. The infolets appear in the sales infolets page.

A few of the infolets also provide you with detailed reports. You may choose to use them as is added, or modify them as per your specific requirements.

The infolets provided by High Tech and Manufacturing are mentioned in the following table:

<table>
<thead>
<tr>
<th>Infolet Title</th>
<th>Recommended Dimension</th>
<th>Detailed Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Open Bids</td>
<td>1x1</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Creating Infolets

To create infolets:

> Note: Ensure that you have access to the job roles for which you are enabling the reports. For more information about access to job roles, refer to the Oracle Sales Cloud Implementation guide.

1. Sign in to Oracle Sales Cloud using the administrator role.
2. Ensure that you are in an active sandbox.
3. On the global region, click your user name to open the **Settings and Actions** menu.
4. Select **Customize Work Area Pages**.
   
   The Customize Pages dialog box opens.
5. Select Edit for the Job Role layer and select the job role for which you want to create the infolet from the Value drop-down list.
6. Click **OK**.
7. Navigate to the Sales Infolets Page and click **Infolet Repository**.
8. Select **Create Infolet** from the list.
9. Enter the name of the new infolet in the Infolet Title field, and select the dimension as provided for the infolet in the preceding table.
10. Click **Save and Close**.

A new infolet has been created.

Adding Business Reports

To add business report to an infolet:

1. On the sales infolets page, click **Add Content** on the newly created infolet.
2. Navigate to: Reports and Analytics - BIPresentation Server - Shared Folders - Extension - oraht.
3. In the folder, add the following reports for each infolet:

<table>
<thead>
<tr>
<th>Infolet Name</th>
<th>Report Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Open Bids</td>
<td>Title: Top Open Bids</td>
</tr>
</tbody>
</table>
### Chapter 7

#### Configuring Analytics

<table>
<thead>
<tr>
<th>Infolet Name</th>
<th>Report Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Open Projects</td>
<td>Tile: Top Open Bids</td>
</tr>
<tr>
<td>Top Opportunities</td>
<td>Top Opportunities</td>
</tr>
<tr>
<td>Sales Performance</td>
<td>Sales Performance</td>
</tr>
<tr>
<td>Pipeline</td>
<td>Pipeline</td>
</tr>
<tr>
<td>Bids by Stage</td>
<td>Bids by Stage</td>
</tr>
<tr>
<td>Bid Values by Contract Award Date</td>
<td>Bid Values by Contract Award Date</td>
</tr>
</tbody>
</table>

4. Click **Close**.

5. The following steps are for infolets which have a detailed report:
   
   a. On the top right of the infolet you have created, select **Actions - Link Detailed Report**.
   
   b. Click **Add Content** in the Detailed Report page and perform the steps provided in the following table:

<table>
<thead>
<tr>
<th>Infolet Name</th>
<th>Navigate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Open Bids</td>
<td>Click <strong>Dashboard</strong> and add the Top Open Bids report.</td>
</tr>
<tr>
<td>Top Open Projects</td>
<td>Click <strong>Dashboard</strong> and add the Top Open Projects report.</td>
</tr>
<tr>
<td>Pipeline</td>
<td>Add the Pipeline Detail report.</td>
</tr>
</tbody>
</table>

6. Click **Close**.

7. Publish the sandbox.

The business report has been added to the infolet.

**Related Topics**

- Setting Up Sandboxes: Procedure
8 Configuring Sales Methodology

Creating Profile Option for Bid and Project

Profile option codes must be created before you set a default sales method for the sales process of each opportunity type. You must use lookup codes to create profile option codes.

The profile option code for standard opportunity is MOO_DEFAULT_SALES_METHOD. You must create the profile option codes for bid and project opportunity types.

The sales methods help you carry out your sales process. Each sales process can be customized for your industry-specific requirements. To set up the three sales processes, refer to the Oracle Sales Cloud Implementation guide.

Searching Lookup Codes

To search for the lookup code:

1. Sign in to Oracle Sales Cloud using the sales administrator role.
2. Navigate to the Setup and Maintenance work area.
3. Search for Manage Standard Lookups task and select it.
4. Search for ORA_AHT_OPPORTUNITY_TYPE in the Lookup Type field.
5. Copy the specific opportunity type lookup code from ORA_AHT_OPPORTUNITY_TYPE: Lookup Code.
6. Click Cancel.

Creating Profile Option Codes

To create profile option code for bid and project opportunity types:

1. Sign in to Oracle Sales Cloud using the sales administrator role.
2. Navigate to the Setup and Maintenance work area.
3. Search for Manage Profile Options task and select it.
4. Click New.

Create Profile Options page opens.

5. Specify the following information in the fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Option Code</td>
<td>AHT_ OPTY_ SALES_ METHOD_&lt;opportunity type lookup code&gt;</td>
</tr>
<tr>
<td>Profile Display Name</td>
<td>Provide a name which describes the field. For example, Default Bid Sales Method.</td>
</tr>
<tr>
<td>Application</td>
<td>Opportunity Management</td>
</tr>
<tr>
<td>Module</td>
<td>Opportunities</td>
</tr>
<tr>
<td>Description</td>
<td>Provide a description which defines the default sales method.</td>
</tr>
</tbody>
</table>
Setting Default Sales Method for Opportunity Types

Default sales method must be set up for each opportunity type to help link sales strategy to sales execution. The sales methods include sales stages which streamline your sales process.

To set default sales method for opportunity types:

1. Sign in to Oracle Sales Cloud using the sales administrator role.
2. Navigate to the Setup and Maintenance work area.
3. Search for Manage Opportunity Profile Options and select it from the search result.
4. Search for each of the profile option codes provided in the following table.

<table>
<thead>
<tr>
<th>Opportunity Type</th>
<th>Profile Option Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard</td>
<td>MOO_DEFAULT_SALES_METHOD</td>
</tr>
<tr>
<td>Bid</td>
<td>AHT_OPTY_SALES_METHOD_ORA_AHT_BID</td>
</tr>
<tr>
<td>Project</td>
<td>AHT_OPTY_SALES_METHOD_ORA_AHT_PROJECT</td>
</tr>
</tbody>
</table>
5. Select the profile option code for the opportunity type being activated from the search results.

6. Click **New** in **Profile Values**.

7. Select the **Profile Level** and **Profile Value** as follows:

   - To set the default sales method at the site level, select **Site** from the **Profile Level** drop-down list. To set the desired profile value of default sales method, select your desired value from the **Profile Value** drop-down list, for example, Standard Sales Process.

   - To set the default sales method at the user level, select **User** from the **Profile Level** drop-down list. To set the desired profile value of default sales method, select your desired value from the **Profile Value** drop-down list, for example, Standard Sales Process.

8. Click **Save and Close**.

   Default sales method has been set up for each opportunity types.
Glossary

**deal size**
Total monetary amount the customer is expected to spend.

**infolet**
A small, interactive widget on the home page that provides key information and actions for a specific area, for example social networking or your personal profile. Each infolet can have multiple views.

**job role**
Job roles provide users with access to both the application functions they need to perform specific jobs in your organization as well as the permissions to access the data where they need to perform the job functions. Examples of job roles provided by Oracle include Sales Administrator, Sales Manager, and Sales Representative.

**role**
Controls access to application functions and data.

**sandbox**
A testing environment that isolates untested code changes from the mainline environment so that these changes don’t affect the mainline metadata or other sandboxes.