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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 you if you are responsible for implementing Service Request Management. You must perform the implementation steps either while implementing or after implementing Oracle Sales Cloud. This 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 Engagement Cloud Using Service Request Management</td>
<td>Contains information to help service managers, service personnel, and other service end users to perform day-to-day business tasks using Oracle Cloud.</td>
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<td>Oracle Sales Cloud Understanding File-Based Data Import and Export</td>
<td>Contains information to help those charged with exporting and importing object data.</td>
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<tr>
<td>Oracle Sales Cloud Securing Oracle Sales Cloud</td>
<td>Contains information to help setup users and sales administrators configure access to Oracle Sales Cloud functionality and data.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Security Reference</td>
<td>Lists the predefined security data that is included in the Sales offering.</td>
</tr>
</tbody>
</table>
Related Topics

• Oracle Help Center
2 Understanding Setup Tasks

Offerings: Explained

Offerings are application solution sets representing one or more business processes and activities that you typically provision and implement as a unit. They are, therefore, the primary drivers of functional setup of Oracle Fusion applications. Some of the examples of offerings are Financials, Procurement, Sales, Marketing, Order Orchestration, and Workforce Deployment. An offering is the highest level grouping of Oracle Fusion Applications functionality. They include functional areas, and alternative business rules known as features.

Setup and Maintenance: Overview

Enabling Offerings: Explained

When planning your implementation, you decide what business processes your organization or company performs or supports. These decisions determine the offerings and functional areas you want to implement. You then configure the offerings and functional areas that support the activities your organization or company performs. During the configuration process, you specifically enable offerings and functional areas for use before you implement them.

Enabling Offerings and Functional Areas

Use the Setup and Maintenance work area to help decide which offerings to enable for implementation. Once you decide to use an offering, you can select the Configure button to choose the configuration details and enable the offering, associated functional areas, and features. All the base functional areas of an offering are automatically enabled for implementation when you enable the parent offering. You choose which optional functional areas to enable. The functional areas appear in an expandable and collapsible hierarchy to facilitate progressive decision making for implementation.

Enabling Features

Features are optional or alternative business rules or methods used to fine-tune business processes and activities supported by an offering or a functional area. If features are available for the offering or functional areas, you can enable them to help meet your business requirements, if desired. In general, the features are set with a default configuration based on their typical usage in most implementations. You should always review the available features for the offering and functional areas and select them as appropriate. Dependent features appear visible when the feature choice they depend on is selected for implementation.

Enabling Offerings: Procedure

You enable offerings to customize the functionality that matches the services you plan on implementing.

Enabling Offerings

To enable offerings, follow these steps.

1. Open the Setup and Maintenance work area (Navigator > Setup and Maintenance).
2. In the Setup and Maintenance Offerings page, select the offering you’re using, then click **Configure**.

3. In the Configure page, select the **Enable** check box for the offering. Also select the **Enable** check box for each of the functional areas you want to use.

4. Click the Features icon for the offering or functional area you have enabled, then enable any features you require. Select **Done** when complete.

5. Select **Done** to return to the Offerings page then repeat the same steps for each of the offerings you are using.

---

**Offering Related Documents: Explained**

Related documents are intended to help you plan a successful implementation of the offerings available on the Getting Started page. Every offering contains a default set of reports as related documents. You cannot modify the default documents. In addition to these reports, you can add custom reports and other related documents to help with planning and implementation or when performing setup tasks. The documents available by default are:

### Offering Content Guide

This report shows detailed information on the business processes and activities supported by the offering.

### Setup Task Lists and Tasks Report

This report shows the list of task lists and tasks that you should complete to successfully implement the offering.

### Associated Features Report

This report shows the list of functional areas and features associated with the offering.

### Related Business Objects Report

This report shows all setup data needed to implement the offering. It provides a list of all business objects that are associated with the setup tasks belonging to the offering.

### Related Enterprise Applications Report

This report shows the list of enterprise applications used by the functional pages and web services for the offering.

---

**Features: Explained**

Offerings include optional or alternative business rules or methods called feature choices, used to fine-tune business processes and activities supported by an offering or a functional area. You make feature selections according to your business requirements to get the best fit with the offering. If the selected offerings and functional areas have dependent features then those features are applicable when you implement the corresponding offering or functional area.

Feature choices can be one of three different types:
Yes or No
If a feature can either be applicable or not be applicable to an implementation, a single check box is presented for selection. Check or deselect to specify yes or no respectively.

Single Select
If a feature has multiple choices but only one can be applicable to an implementation, multiple choices are presented as radio buttons. You can turn on only one of those choices.

Multi-Select
If the feature has multiple choices but one or more can be applicable to an implementation then all choices are presented with a check box. Select all that apply by checking the appropriate choices.

Implementation Projects: Explained
You can create implementation projects to manage the implementation of an offering and functional areas as a unit throughout the implementation life cycle, or maintain the setup of specific business processes and activities customizing the list of tasks to complete their implementation.

An implementation project is the list of setup tasks you need to complete to implement selected offerings and functional areas. You create a project either by:

- Selecting an offering and its functional areas you want to implement together, then customize the list of tasks for such offering and functional areas as applicable.
- Selecting specific setup task lists and tasks you require for a specific configuration.

You can also assign these tasks to users and track their completion using the included project management tools.

Selecting Offerings
When creating an implementation project you see the list of offerings and functional areas that are configured for implementation. Implementation managers specify which of those offerings and functional areas to include in an implementation project. It is strongly recommended that you limit your selection to one offering per implementation project, even though the application does not prevent you from including more than one. The implementation managers should decide based on how they plan to manage their implementations. For example, if you implement and deploy different offerings at different times, then having separate implementation projects help to manage the implementation life cycles. Furthermore, the more offerings you included in an implementation project, the bigger the generated task list is. The implementation task list includes all setup tasks needed to implement all included offerings. Alternatively, segmenting into multiple implementation projects makes the process easier to manage and ensures that import and export sequence of the project data is straightforward in the correct sequence.
Implementation Project Task Lists: Explained

Once you make offering and functional area selections, Oracle Fusion Functional Setup Manager creates the implementation project and generates a complete list of setup tasks based upon your selections. The predefined hierarchical task list added when you select an offering is called the offering top task list. It includes a complete list of all tasks, including the prerequisites required to implement the offering. Typically, this task list has the same name as the name of the offering it represents. If multiple offerings are included in a single implementation project, then each one of the offering top task lists shows as a top node in the implementation task list hierarchy.

Included Tasks

Tasks used to set up any of the dependent functional areas and features, which are not selected for implementation are excluded from the task list. The implementation task list is generated according to the offering configurations and top task list definitions present at the time an implementation project is created. Once created, the task list in the implementation project becomes self-contained and does not change based on any changes made to the offering configurations or top task list definitions.

Task Organization

The offering top task list shows as the top node in the implementation task list hierarchy. If multiple offerings are included in a single implementation project then top task list of each of the offerings becomes a top node of the implementation task list hierarchy. Within each top node, the tasks are organized with prerequisites and dependencies in mind.

• The most common requirements across all offerings are listed first.
• Next, the common tasks across an application area (such as Customer Relationship Management, or Financials), if applicable, are shown.
• Next, tasks that are common across multiple modules and options within an offering display.
• Finally, tasks for specific business areas of the offering, such as Opportunity Management, Lead Management, Territory Management, or Sales Forecasting display.

Predecessor Tasks

Some setup data may be a prerequisite for other setup data. The tasks that involve entering the prerequisite data may be identified as predecessor tasks.

In an assigned task list a task with predecessors is indicated as such, and provides you the following information:

• Which tasks are the predecessors of a given task.
• The status of the predecessor tasks.
• The recommended status of the predecessor tasks before performing the given task.

Predecessor tasks are identified to give you better understanding of the data dependency, but you are not prohibited from performing the task even if the predecessor task status is not in the recommended state. Different implementations may select to implement the offerings in different orders. A predecessor task may also be a common task for many different offerings. If a predecessor task was performed as part of a previous implementation and setup data was entered, then you may be able to proceed with the dependent tasks without performing the predecessor tasks in the current implementation. The predecessor and the dependent tasks might be performed in parallel by entering certain values of predecessor first and
then followed by entering the data that is dependent on the already entered parent data, and then repeating the process for each step of the data dependency.

### Setting Up the Service Offering: Overview

Review all of the setup tasks in this topic. Depending on your deployment, some steps may be optional. Additionally, review all of the setup tasks Oracle completed for you. Use this topic as a guide to completing tasks specific to the Service offering. The setup task for Service Request Management is enabled through the Service offering.

> **Note:** The Service offering is available only to Oracle Cloud customers. The Service offering is not available for on-premises deployments.

### Common Setup Task Summary

This section summarizes setup tasks that are shared with the Sales offering. Depending on your deployment, the tasks in this section might not be required, or might already have been completed. If your company has already implemented these tasks for the Sales offering, then review them again carefully. There may be minor adjustments that are required to apply to your Service requirements. For more information about the setup tasks in this section, refer to the Oracle Sales Cloud Getting Started with Your Implementation Guide.

> **Note:** Setup tasks specific to the Service offering follow this topic: you must review each of these setup tasks.

<table>
<thead>
<tr>
<th>Setup Description</th>
<th>Task Names</th>
</tr>
</thead>
</table>
| Optionally, review and modify the company profile information defined for you. If the profile information was defined for Oracle Sales Cloud, it is unlikely that you are required to make any changes. | • Manage Enterprise HCM Information  
• Manage Legal Jurisdictions  
• Manage Legal Addresses  
• Manage Legal Entity  
• Manage Business Unit  
• Manage Common CRM Business Unit Profile Options  
• Manage Currency Profile Options  
• Manage Currencies  
• Manage Accounting Calendars  
• Manage Calendar Profile Options  
• Manage Geographies  
• Manage Territories  
• Manage Address Validation Profile Options |
| Grant yourself the additional privileges that you require to complete the setups in this guide and create any additional users to help you with setup. | • Manage Job  
• Run User and Role Synchronization Process  
• Manage HCM Role Provisioning Rules  
• Manage Job Roles  
• Manage Users |
### Setup Description

<table>
<thead>
<tr>
<th>Task Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Internal Resource Organizations</td>
</tr>
<tr>
<td>Manage HCM Role Provisioning Rules</td>
</tr>
<tr>
<td>Manage Resource Organization Hierarchies</td>
</tr>
<tr>
<td>Manage Enterprise HCM Information</td>
</tr>
</tbody>
</table>

#### Task Names

- **Manage Internal Resource Organizations**
- **Manage HCM Role Provisioning Rules**
- **Manage Resource Organization Hierarchies**
- **Manage Enterprise HCM Information**

### Service-Specific Set Up Task Summary

This section summarizes setup tasks that are specific to the Service offering. Depending on your deployment, some of the tasks listed might not be required, or might already have been completed. Review this list and the referenced topics to determine which Service-specific tasks apply to your deployment.

The following setup tasks are specific to the Service offering:

- Enabling the Service Offering: Explained
- Enabling Service Request Outbound E-Mail: Explained
- About Security Roles: Explained
- Customizing Service Request Lookups: Explained
- Defining Service Request Assignment Rules: Explained
- Managing Service Request E-Mail Message Profile Options: Explained
- Managing Service Request Categories: Explained
- Managing Service Request Knowledge Profile Options: Explained
- Defining a Catalog for the Service Offering: Explained
- Enabling Oracle Social Network Objects for Service Requests: Explained

### Related Topics

- Setup Tasks Completed for You in Oracle Sales Cloud
- Enabling Service Request Outbound E-Mail: Explained
- About Security Roles: Explained
Enabling the Service Offering: Explained

This topic explains how to enable the Service offering.

To enable the Service offering:

1. Sign in as an administrator or a setup user.
2. Navigate to the Setup and Maintenance work area and click Service.
3. Click the Configure button.
   
   The Configure: Service page appears.
4. In Functional Areas, click the Change Configuration link.
5. For the Service offering, select the Enable for Implementation check box.
6. Click Setup.

The Service offering is enabled.

Setting up Service Requests for Partners: Explained

Service Requests (SR) can be used to capture and resolve issues reported by your partner accounts. Instead of associating customer accounts and customer contacts to the SR, you can associate partner accounts and partner contacts. Partner users or partner contacts can use the simplified user interface to submit service requests and to view any responses returned by an internal resource that owns the SR.

Note: The service offering provides only one global service product catalog and one global category hierarchy. All service requests, whether they are associated with customer accounts or partner accounts, display the same hierarchy of products and categories.

To enable creating service requests specific to partners, you must customize the page layouts for the service request object. The layout must be customized according to the privileges provided to the external partner contact and the internal resources that access the SR. For detailed information about customizing layouts using the application composer, see Customizing the Applications for Functional Administrators.

The users that can access the partners SR can be broadly classified as internal and external resources. External resources are partner contacts that create, submit and view an SR for the partner that they represent. Internal resources own and work on the SRs for one or more partners that they are assigned to. Oracle recommends that you provide access to partner service requests using the following standard user roles. However, you can grant access to other standard and custom roles that you create, depending on your requirements.

- Partner sales representative - An employee from a partner company that can request support on issues. In the Partner Management work area, these users are also represented as partner contacts.
- Channel account manager (CAM) - Internal resource responsible for a set of partner accounts. You can grant access to this role if you want them to respond to the partner service requests in addition to their other duties.
- CRM administrator - Configures the application, such as assignment rules, service product catalog, queues, layouts, extensibility changes, and so on.
When a partner account is associated with the SR, the **Primary Contact** field is always treated as a partner contact. The primary contact field enables users to search and select only from the partner contacts associated with the partner account that is selected. You can also modify the SR list view for the partner contact roles, to include columns specific to the partner service requests. For more information about using page composer to modify the list view, see Page Customization.

### Customizing the Service Request Page Layout for External Resources

External resources in partner contacts should be provided limited access to creating and editing a partner SR. The following list describes the recommended fields that you must enable and disable in the SR layout for external resources.

- Remove internal only fields such as **Queue**, **Assigned To**.
- Add Groovy to make the **Partner Account**, **Status** and **Channel Type** read-only.
- Remove the **Attachment +** icon. Partner users can only upload and view attachments through a specific SR message.
- Enable only the **Summary** and **Message** subtabs.
- (Optional) Allow the user to set the severity when creating an SR. However, the user cannot change this when editing the SR.

In addition to customizing the SR layout page, remove the **Service Request** action in the **Contacts** page layout using the application composer.

### Customizing the Service Request Page Layout for Internal Resources

Internal resources are resources that work on the partner SR. The following list describes the recommended fields that you must add to the SR layout for internal resources.

- Add **Partner Account** field to the SR page layout. Since the primary contacts are chosen based on the partner account selected, display the **Partner Account** field first, above the **Primary Contact** field.
- (Optional) Remove the **Account** field from the layout to avoid confusing the user. For partner service requests, the **Account** field is only for reference information.

In addition to creating page layouts for the partner SR work area, you can also expose the Service Request sub tab on the Partner 360 work area.

### Assigning Partner Service Requests to Queues

If you have a different set of resources responding to customer and partner service requests, you can set up separate queues to address the partner SRs.

To assign a partner SR to a queue, do the following.

1. In FSM, search and select the task **Manage Service Request Assignment Objects**.
2. In the **Manage Service Request Assignment Objects** page, select **Service Request** and the select **Attributes**.
3. In the **Attributes** tab, add the **Partner Account** field and save the changes.
4. In FSM home, search and select the task **Manage Service Request Assignment Rules**.
5. Add rules to ensure that when the **Partner Account** field is populated, the service request must be assigned to a different set of queues. For more information about assigning service requests to queues, see Define Service Request Assignment Rules.
Migrating Data Between Environments: Points to Consider

Almost all Oracle Fusion application implementations require moving data from one instance into another at various points in the life cycle of the applications. For example, one of the typical cases in any enterprise application implementation is to first implement in a development or test application instance and then deploy to a production application instance after thorough testing. You use various methods or tools to accomplish the migration of data.

For more information, see the Importing and Exporting Setup Data chapter of the Oracle Applications Cloud Using Functional Setup Manager guide.

Related Topics

- Oracle Applications Cloud Using Functional Setup Manager
- Performing Offering-based Export
- Performing Offering-based Import

FAQs

What's a functional area?

A functional area is a grouping of functionality within an offering. It may be an optional piece of functionality that you may want to implement as part of an offering. Optional functional areas can be included or excluded from their parent offering. Functional areas may be hierarchical, and therefore may be subordinate to another functional area. An offering has at least one base or core functional area and may have one or more optional functional areas. Additionally, one or more or features may be associated to an offering.
3 Understanding Preconfigured Data and Processes

Profile Options, Lookups, and Scheduled Processes: Overview

In Oracle Sales Cloud, profile options, lookup types, and scheduled processes let you configure application behavior and refresh data.

Briefly, the following are the purposes of profile options, lookup types, and scheduled processes:

- Profile options: Let you configure the application behavior.
- Lookup types: Provide the lists of values in applications. Many lookup types can be customized to fit your business needs.
- Scheduled processes: Refresh data in the applications.

You can find additional information on profile options, lookup types, and scheduled processes in this chapter and in the related topics.

Related Topics

- How can I access predefined profile options?
- How can I access predefined lookups?
- Viewing Details About Predefined Scheduled Processes: Procedure

Profile Options: Explained

Profile options let you configure and control application data centrally. Administrators and setup users manage profile options in the Setup and Maintenance work area.

Profile options store various kinds of information. The following table lists some examples.

<table>
<thead>
<tr>
<th>Type of Information</th>
<th>Profile Option Setting Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>User preferences</td>
<td>Provides access to social networking features</td>
</tr>
<tr>
<td>Installation information</td>
<td>Identifies the location of a portal</td>
</tr>
<tr>
<td>Configuration choices</td>
<td>Changes UI skins and behaviors</td>
</tr>
<tr>
<td>Processing options</td>
<td>Determines how much information to log</td>
</tr>
</tbody>
</table>
Profile Option Hierarchy Levels
Profile options can be set at different levels, such as site level or user level. The application gives precedence to certain levels over others, when multiple levels are set. The allowed levels come preconfigured with the application.

In the predefined profile option levels, the hierarchy levels and their precedence are:

1. User: This level affects only the current user. It has the highest precedence, over Site and Product.
2. Product: This level affects a product or product family. The application gives it priority over Site level. However, if the user level is set, the user level takes precedence.
3. Site: This level affects all applications for a given implementation. The application gives it the lowest precedence when other levels are set. If no other levels are set, however, it is the highest level.

As a best practice, set site-level profile option values before specifying values at any other level (where available). The profile option values specified at the site-level work as the default until profile option values are specified at the other levels.

The following table shows an example of the predefined profile option hierarchy levels and their priorities.

<table>
<thead>
<tr>
<th>Level</th>
<th>Priority</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site</td>
<td>Lowest</td>
<td>Currency for a site is set to Euros.</td>
</tr>
<tr>
<td>Product</td>
<td>Supersedes Site</td>
<td>Currency for the product or set of products is set to UK pound sterling.</td>
</tr>
<tr>
<td>User</td>
<td>Highest, supersedes Product</td>
<td>Currency for a user is set to US dollars.</td>
</tr>
</tbody>
</table>

You can find additional information on profile options in the related topics.

**Related Topics**
- How can I access predefined profile options?
- Profile Options and Related General Preferences: How They Work Together
- Profile Options: Overview

Jobs and Profile Options for Service Request Management: Explained
You can set various profile options and schedule job processes for service request management. Some of the profile options must be used along with job processes to achieve desired results. For example, after setting the profile value for closing a resolved SR after N number of days, schedule a job process that closes SRs.

Profile Options For SR Management
The following table lists the various profile options for service request management and their purposes.
### Profile Options and Descriptions

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SVC.Assign.to_queue.on_create</td>
<td>Assigns an SR to a queue automatically, when the SR is created.</td>
</tr>
<tr>
<td>SVC.SR.In.Resolved.Days</td>
<td>Defines the number of days after which any resolved SR is automatically closed. This profile option must be used along with the Auto-Close Service Requests job process. For more information, see Job Processes for SR Management.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> The SVC.SR.In.Resolved.Days profile value must be set to 1 or greater for the Auto-Close Service Request job to run.</td>
</tr>
<tr>
<td>SVC.SR.In.Waiting.Days</td>
<td>Defines number of days for which a service request must be in Waiting status before the SR is auto-resolved. This profile option must be used along with the Auto-Close Service Requests job process. For more information, see Job Processes for SR Management.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> The SVC.SR.In.Waiting.Days profile value must be set to 1 or greater for the Auto-Close Service Request job to run.</td>
</tr>
<tr>
<td>SVC.Auto.Closed.Status_CD</td>
<td>Defines the status code to use for auto-closing service requests that have been in Resolved status for at least the number of days specified by SVC.SR.In.Resolved.Days. This profile option must be used along with the Auto-Close Service Requests job process. For more information, see Job Processes for SR Management.</td>
</tr>
<tr>
<td>SVC.Auto.Resolved.Status_CD</td>
<td>Defines the status code to use for auto-resolving service requests that have been in Waiting status for at least the number of days specified by SVC.SR.In.Waiting.Days. This profile option must be used along with the Auto-Close Service Requests job process. For more information, see Job Processes for SR Management.</td>
</tr>
<tr>
<td>SVC.PUID.Format</td>
<td>Defines the format for the unique reference number on each SR.</td>
</tr>
<tr>
<td>SVC.PUID.Prefix</td>
<td>Defines an optional prefix that can be included in an SR reference number.</td>
</tr>
<tr>
<td>SVC.SR.Default.Severity_CD</td>
<td>Sets the default Severity value for a new SR.</td>
</tr>
<tr>
<td>SVC.SR.Default.Status_CD</td>
<td>Sets the default Status code for a new SR.</td>
</tr>
<tr>
<td>SVC.SR.In.Deleted.Days</td>
<td>Defines the number of days after which a deleted SR is purged. An SR that is soft deleted can be retrieved. However, once purged, an SR cannot be recovered. This profile option must be used along with the Purge Deleted Service Requests job process to purge SRs. For more information, see Job Processes for SR Management.</td>
</tr>
</tbody>
</table>

### Job Processes For SR Management

This section lists job processes that you can schedule to manage service requests.
<table>
<thead>
<tr>
<th>Job Process Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Auto-Close Service Requests</td>
<td>Closes service requests that were resolved a certain number of days ago, and resolves service requests that have been in waiting status for a certain number of days. The number of days for both the scenarios is set using the SVC_SR_IN_RESOLVED_DAYS and SVC_SR_IN_WAITING_DAYS profile options respectively.</td>
</tr>
<tr>
<td>Purge Deleted Service Requests</td>
<td>Purges service requests and their child records that were deleted a certain number of days ago. The number of days is set using the SVC_SR_IN_DELETED_DAYS profile option.</td>
</tr>
<tr>
<td>Load and Update Cloud Metrics for Service</td>
<td>Performs incremental loading and updating of usage and business metrics that are targeted to cloud usage patterns.</td>
</tr>
<tr>
<td>Service Request Queue Assignment</td>
<td>Assigns queues to service requests. This job takes the following parameters.</td>
</tr>
<tr>
<td></td>
<td>• Work Object Code: Indicates business objects that get assigned to agents, such as, service requests.</td>
</tr>
<tr>
<td></td>
<td>◦ Expected Value: ORA_Service_Request_Work_Object</td>
</tr>
<tr>
<td></td>
<td>• Candidate Object Code: Indicates objects that are the possible pool of assignment candidates, such as queues.</td>
</tr>
<tr>
<td></td>
<td>◦ Expected Value: ORA_Queue_Candidate_Object</td>
</tr>
<tr>
<td></td>
<td>• Assignment Mode (LOV: Classification, Matching, Scoring, Territory): Indicates the type of assignment processing. Matching is the only mode that is supported.</td>
</tr>
<tr>
<td></td>
<td>• View Criteria Name: Indicates the view criteria used to identify the service requests to be assigned.</td>
</tr>
<tr>
<td></td>
<td>◦ Expected Value: OpenSRsUnassignedToQueue</td>
</tr>
<tr>
<td></td>
<td>• View Criteria Bind Values: Indicates the bind variables required for the view criteria.</td>
</tr>
<tr>
<td></td>
<td>• Metrics Logging Interval (defaults to 100): Indicates the number of work objects in a sub process before logging assignment metrics, such as update metrics after processing 100 SRs. This is used if your object support Enterprise logging for assignment.</td>
</tr>
<tr>
<td></td>
<td>• Diagnostic Mode (check box): Indicates if the process must be run in diagnostic mode to view the details of assignment processing in an output log.</td>
</tr>
</tbody>
</table>

Managing Service Request Knowledge Profile Options: Explained

To search for Knowledge and link knowledge documents to a service request, Knowledge must be enabled in a profile option. This topic describes how to enable the profile option.

To enable Knowledge in service requests:

1. Sign in as an administrator or a setup user.
2. Navigate to the Setup and Maintenance work area and search for the Service Request Knowledge Profile Options task.
3. Click the task name link in the search results.
   The Manage Service Request Knowledge Profile Options page appears.
4. In the SVC_ENABLE_KNOWLEDGE_IN_SR Profile Values work area, click the Site row.
5. Enter Y in the Profile Value field.
6. Click **Save**.

Knowledge has been enabled for service requests.

### Lookup Types: Explained

Lookup types provide the lists of values in application fields that are drop-down lists. For example, while creating a service request, service personnel can select the severity of the SR, which is a drop-down list. The values in that list are derived from the lookup type, `ORA_SVC_SR_SEVERITY_CD`. This lookup type has several potential values known as lookups, each with their own unique lookup code and a meaning that displays in the UI.

#### Customizing Lookup Types

You can customize many lookup types during or after implementation.

The customization level of a lookup type determines whether the lookups in that lookup type can be edited. The customization levels are: User, Extensible, and System.

The following table shows which lookup management tasks are allowed at each customization level.

<table>
<thead>
<tr>
<th>Allowed Task</th>
<th>User</th>
<th>Extensible</th>
<th>System</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deleting a lookup type</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Inserting new codes</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Changing the wording that displays on the page (Meaning field)</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Updating start date, end date, and enabled fields</td>
<td>Yes</td>
<td>Yes, only if the code is not predefined data</td>
<td>No</td>
</tr>
<tr>
<td>Deleting codes</td>
<td>Yes</td>
<td>Yes, only if the code is not predefined data</td>
<td>No</td>
</tr>
<tr>
<td>Updating tags</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Updating module</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

If a product depends on a lookup type, the customization level must be set to system or extensible to prevent deletion. Once the customization level is set for a lookup type, it cannot be modified. The customization level for lookup types created using the Define Lookups page is by default set at the User level.

### Service Lookup Types

You can find lookup types by searching for an associated setup task in the Setup and Maintenance work area. Lookup types are grouped by task or task list. Each task or task list provides access only to certain lookup types. However, the
generic tasks provide access to all lookups types of a kind, such as all common lookups that are associated with the Manage Common Lookups task. Lookups defined for a specific application are managed using a task or task list associated with that application. Here are some of the common Service lookup tasks or task lists:

- Define Service Request Lookups
- Manage Contact Lookups
- Manage Customer Center Lookups
- Manage Service Request Severities
- Manage Service Request Channel Types

To find a Service lookup type:

1. Sign in to the application as the service administrator or a setup user.
2. Navigate to Setup and Maintenance.
3. Search for and select the task or task list for the lookups you want to find. For example, you can search on the word lookups to find all tasks or task lists containing that word. Or, if you know the name of the lookups task or task list, you can search for it directly. For example, you can search for Define Service Request Lookups.
4. In the lookup types page, click a lookup.

Related Topics
- How can I access predefined lookups?

Customizing Service Request Lookups: Explained

Administrators can customize lookups for service requests. Optionally, you can map status values to status types. By default, the following five Status types exist for service requests:

- New
- In Progress
- Resolved
- Waiting
- Closed

A service request always has one of these status types. However, administrators might want to display different labels for status types or change the display sequence. For example, this might be useful in situations where you want to distinguish between statuses such as "In Progress - Troubleshooting" versus "In Progress - Repairing." This procedure maps one or more statuses to status types.

To customize service request lookups:

1. Sign in as an administrator or a setup user.
2. Navigate to the Setup and Maintenance work area and search for the Define Service Request Lookups task.
3. Click the task name link in the search results.
4. Click the task that you want to modify.
5. In Lookup Codes, click the lookup code that you want to modify.
6. Modify the fields to correspond to your needs.
7. Click **Save and Close**.
The service request lookup is modified.

**Scheduled Processes: Explained**

Run scheduled processes to manipulate a set of records for a specific business need, or to get printable output with information about certain records. Some processes do both, for example, to import records and provide a report about them.

**Report Output**

A scheduled process that provides output, or the output itself, is also referred to as a report.

- Many types of reports are available, for example regulatory statements or listings of records that meet specified parameters.
- Predefined templates determine the report layout.

**Parameters**

A scheduled process might have parameters that you can set to control which records are included or how they are affected. For example, a process updates only the records that are effective within the date range that you define.

**Submission**

Each scheduled process that you run is based on a job. The job is the executable that determines what the process can do and what options you can set for the process.

You can submit the same process using different parameters and other settings. Each process submission has a unique process ID.

**Process Sets**

A process set is a scheduled process that's based on a job set, which contains multiple jobs for one process submission.

> **Note:** In some cases, when you submit a scheduled process, the job logic causes other processes to automatically run. This isn't the same as a process set.

**Related Topics**

- Process Sets: Explained
- Submitting Scheduled Processes and Process Sets: Procedure
- Managing Scheduled Processes That You Submitted: Points to Consider
How can I edit lookups?

On the Define Lookups page, you can edit the existing lookup codes of a lookup type or add new lookup codes. To open the page, navigate to the Setup and Maintenance work area and search for the Define Lookup task list.

The task list contains three tasks:

- Standard Lookups
- Common Lookups
- Set-enabled Lookups

Each task contains a predefined set of lookup types classified and stored as per the functionality. Open a task to search and edit the required lookup. However, you may not be able to edit a lookup if its customization level doesn’t support editing.

Why can't I see my lookup types?

Lookup types are classified using tasks that involve a group of related lookups, such as Manage Geography Lookups. Each task gives you access only to certain lookup types. However, the generic tasks provide access to all lookups types of a kind, such as common lookups associated with the Manage Common Lookups task.

If the lookup types in an application are available in the standard, common, or set-enabled lookups view, they are central to an application. However, lookup types defined for a specific application are managed using the task or task list for that application.
4 Setting Up Users and Security

Defining Setup Users: Overview

Among the initial activities when setting up your cloud service is the creation of users who perform setup tasks.

Oracle creates an initial user for you when your environment is provisioned. This initial user is configured to perform security tasks, which include the creation of other users and the granting of additional privileges. The initial user creates other users, known as setup users, to help with application setup. The setup user performs the tasks in the implementation projects, sets up enterprise structures, creates application users, and administers security.

Setup users access the Manage Users task in the Setup and Maintenance work area to create setup users. For information about creating setup users, see the Oracle Sales Cloud Getting Started with Your Implementation guide.

Related Topics

- Oracle Help Center guides

Defining Security: Overview

Access to Oracle Sales Cloud functionality and data is secured using role-based access control. In a role-based access control model, users are assigned roles, and roles are assigned access privileges to protected system resources. Initial access to Oracle Sales Cloud is limited to one initial user that Oracle creates. Using this initial user, you create other required users, such as setup users, the sales administration user, and application users. You then provision each user with roles, which provide access to application functions and data.

To set up users and roles, you perform Sales Setup tasks listed for the Users and Security functional area. You can perform most of these tasks both during implementation and later as requirements emerge. This topic introduces the tasks in this list.

For more information about creating users, see the Oracle Sales Cloud Getting Started with Your Implementation guide. For more information about setting up security and provisioning roles to users, see the Oracle Sales Cloud Securing Oracle Sales Cloud guide. Both guides are available from Oracle Help Center.

Manage Job Roles Task

The Sales Cloud security reference implementation provides many predefined job roles. You perform the Manage Job Roles task to:

- Review the role hierarchy of a job or abstract role.
- Create custom job and abstract roles.
- View the roles assigned to a user and list the users who have a specific role.

A user with the IT Security Manager job role performs the Manage Job Roles task. This task opens the Roles tab of the Security Console.
Manage Duties Task

You perform the Manage Duties task to:

- Review the duties of a job or abstract role.
- Manage the duties of a custom job or abstract role.
- Create custom duty roles.

A user with the IT Security Manager job role performs the Manage Duties tasks. This task opens the Roles tab of the Security Console.

Manage Data Security Policies Task

You use the Manage Data Security Policies task to manage the data security policies that determine grants of entitlement to a user or role on an object or attribute group. A user with the IT Security Manager job role performs the Manage Data Security Policies task. This task opens the Roles tab of the Security Console.

Note: Other data security tasks listed in the Users and Security functional area task list do not apply to Oracle Sales Cloud.

Manage Users Task

You create application users in the UI using the Manage Users task. You can also import partner contact data using the Import Partner Users task. A user with the IT Security Manager job role performs the Manage Users tasks.

Note: You cannot perform bulk imports of data into Sales Cloud using the Import Worker Users task available from the Users and Security functional area task list. However, you can create users by importing legacy users from a file using the Manage File Import Activity task available from the Setup and Maintenance work area. For information on importing users, see the Oracle Sales Cloud Getting Started with Your Implementation guide.

Manage HCM Role Provisioning Rules Task

Oracle provides predefined role mapping rules for provisioning many of the standard job roles included with the application. However, you can create any additional role mappings you need to control the provisioning of roles to application users using the Manage HCM Role Provisioning Rules task. For example, you can create a role mapping to provision the Channel Sales Manager role automatically to specified sales managers.

Related Topics

- Oracle Help Center guides
About Security Roles: Explained

Many job roles and duty roles are predefined in the Service offering. The following table lists the main predefined job roles specific to this product area.

<table>
<thead>
<tr>
<th>Job Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Service Manager</td>
<td>Manages a group of Customer Service Representatives. The person in this job role manages the queues of open service requests. Also this person ensures that work is being assigned and resolved by the pool of resources. This individual also monitors incoming service requests.</td>
</tr>
<tr>
<td>Customer Service Representative</td>
<td>Responds to a variety of customer requests. The person in this job might receive requests to help with a product or service problem or to clarify a pricing or ordering question. This individual is usually assigned to one or more queues of service requests that are used to categorize incoming service requests by customer type, category, or product.</td>
</tr>
<tr>
<td>Knowledge Analyst</td>
<td>Creates, curates, and maintains knowledge articles. The person in this job supports the work of Customer Service Managers and Customer Service Representatives as they manage customer issues.</td>
</tr>
<tr>
<td>Knowledge Manager</td>
<td>Manages a knowledge instance. The person in this job manages the administration and operations of a knowledge program. In addition, this person ensures that knowledge can be created and maintained by analysts and found by knowledge users.</td>
</tr>
</tbody>
</table>

In addition to the job roles, the following table lists the duty roles specific to the Service offering.

<table>
<thead>
<tr>
<th>Duty Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Request Troubleshooter</td>
<td>Manages all aspects of the Service Request object. A customer service representative is typically given this duty role</td>
</tr>
<tr>
<td>Service Request Contributor</td>
<td>Creates or adds information to service requests. This person has basic Service Request Management capabilities. This person cannot respond to customers, assign service requests to a user, or delete attachments from service requests. This role is typically given to non-service users, for example, sales representatives, product managers and engineers.</td>
</tr>
<tr>
<td>Service Request Power User</td>
<td>Does everything that a troubleshooter can, with the added privileges to manage queues. Customer service managers are typically given this duty role.</td>
</tr>
<tr>
<td>Service Request Administrator</td>
<td>Does everything that a power user can do. Additionally, this person can administer all aspects of the application, including the setup. CRM application administrators are typically given this role.</td>
</tr>
<tr>
<td>Service Request Channel User</td>
<td>Manages all aspects of a service request that is associated with a partner account. This duty is similar to the service request troubleshooter.</td>
</tr>
<tr>
<td>Service Request Partner User</td>
<td>Submits service requests to get assistance with partner sales or support issues. This duty is granted to a contact from a partner account.</td>
</tr>
</tbody>
</table>
Role Provisioning Rules for Service Resource Roles

The following resource roles are predefined for the Service offering: Service Manager, and Service Representative. You must create role provisioning rules for these resource roles to automatically assign new service users with the job roles and abstract roles required to do their job. For additional information about creating these rules, review the related topic about Creating Rules to Automatically Provision Job Roles to Sales Users.

Use the following table as a guideline to create the role provisioning rules for Service offering:

<table>
<thead>
<tr>
<th>Provisioning Rule Name</th>
<th>Condition</th>
<th>Abstract Roles Provisioned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service Manager</td>
<td>HR Assignment is Active</td>
<td>Customer Service Manager</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Service Manager</td>
<td>Resource</td>
</tr>
<tr>
<td>Service Representative</td>
<td>HR Assignment is Active</td>
<td>Customer Service Representative</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Service Representative</td>
<td>Resource</td>
</tr>
</tbody>
</table>

Related Topics

- Role-Based Access Control: Explained
- What You Must Do Before Creating Sales Users
- Creating Rules to Automatically Provision Job Roles to Sales Users

Enabling Knowledge Access to Users, Products, and Categories: Explained

You must configure your instance of the Knowledge Application to enable access to Engagement Cloud user, product, and category information.

You enable Knowledge to access user, product, and category information by:

1. Creating the Knowledge integration user.
2. Configuring the integration user for Knowledge.

Note: The function of the Knowledge integration user is to provide access for the Knowledge application. You should provide details for this user, such as an e-mail address, employer, and business unit that correspond to an existing staff member who can assume responsibility for this functionality.
Creating the Knowledge Integration User

You must create the knowledge integration user to enable Knowledge to access the required user, product, category, information.

1. Sign in as the implementation user.
2. Create the integration user with the following attributes:
   - Name: km_integration_user
   - Resource Role: Sales Administrator
   - Job Roles: Employee, Resource, Sales Administrator, Customer Service Manager, Knowledge Manager

   **Note:** Selecting Auto-provision may add the required job roles.

3. Save the user information.

   The application sends a confirmation e-mail to the specified address.
5. Run the Import User and Role Application Security Data job.

Configuring the Integration User for Knowledge

You configure the knowledge integration user by specifying the integration user credentials on the Knowledge Authoring system configuration page. You must use a specific account to configure the integration user.

- If you are implementing Knowledge as part of a new order, sign in with the exact Service Administrator credentials issued by Oracle when the service was initially provisioned.
- If you are implementing Knowledge as part of an update order, sign in as the integration user (km_integration_user) to configure the integration user.

Configure the integration user as follows:

1. Click the **Tools** tab in the Authoring menu.
2. Select System, Configure from Tools menu, and then select Integration Configuration.
3. Enter the integration user name (km_integration_user), and password in the Integration User and Password fields.
4. Test the configuration using the Test Configuration option.
5 Setting Up Work Assignment

Assignment: Implementation Concepts

Work Assignment: Overview

In Oracle Sales Cloud, you use the assignment engine to assign resources (for example, salespeople or territory owners) to the business objects they must work on, such as an opportunity or a lead. Being assigned to business objects gives resources and their managers visibility into the business object. Territory-based assignment is the default assignment mechanism in Oracle Sales Cloud. You also can use rule-based assignment to assign additional resources to objects.

Candidate and Work Objects

When setting up assignment, you must be familiar with two types of assignment objects: candidate objects and work objects:

- Work objects are the business objects that are assigned, for example, accounts, opportunities, leads, partners, and deals.
- Candidate objects are the possible pool of assignment candidates, for example, resources or territories.

Rule-Based Assignment

Rule-based assignment lets you set up additional rules that are used to assign resources to work objects. Rule-based assignment lets you capture attributes that aren't defined in territory-based assignment. After you set up the rules containing the conditions that records must meet when resources match the rule conditions, they are assigned to the object.

For example, you can use rules to do the following:

- Assign a certain salesperson to the sales team when the customer is located in a specific state or region.
- Assign the accelerated leads expert to leads whose time frame is less than three months.
- Calculate the lead rank by using the lead score.

Rule-based assignment requires that you plan your rules, create the rules using the rules UI, and set profile options to configure the assignment behavior, in addition to any scheduled processes that must be run.

Assignment Profile Options

Each of the business objects available in assignment has its own set of profile options that allow you to further configure the application behavior.

Scheduled Processes

Scheduled processes are batch jobs that capture data and allow business objects to act on that data. You must schedule several processes when using assignment.

Assignment Reports

You can use the Diagnostic Dashboard to generate reports about the assigned objects and the volume of territory data involved in assignment.
Assignment Resources

To learn more about assignment in Sales Cloud, refer to the following resources:

- Related topics: If you’re reading this topic in the Oracle Sales Cloud - Implementing Sales guide, refer to the related topics in the Setting Up Work Assignment chapter.
- Online help: Use the keyword assignment to search for the relevant topics.
- Assignment Resource Center: See the Assignment Manager Resource Center page on My Oracle Support (Doc ID 1522958.1) for more resources.

Configuring Assignment: Critical Choices

Assignment is the process of selecting a candidate object and executing the association to a work object. Assignment consists of three phases:

- Setup phase: Setting up assignment processing through assignment configuration.
- Matching phase: Matching rules or mappings are evaluated to find the right assignees from a list of possible candidates.
- Assignment phase: The assignment of matching candidates is handled.

An assignment configuration is predefined for each Sales Cloud application providing assignment processing. This assignment configuration is available from one of the following setup tasks:

- Manage Customer Center Assignment Objects
- Manage Sales Assignment Manager Objects
- Manage Sales Lead Assignment Objects

You can use these setup tasks to add or remove assignment attributes, define the relationship between each work object and candidate object, and define mapping sets and mappings that drive territory-based assignment and rule categories that drive rule-based assignment.

Note: Use the Manage Sales Assignment Manager Objects task for opportunity assignment.

The predefined assignment configuration also includes the mapping sets and mappings that drive territory based assignment.

To best plan the configuration, you should consider the following points:

- Assignment objects
- Attributes
- Mappings sets and mappings
- Rules

Assignment Objects

An assignment object is a data entity or a collection of data treated as a unit, such as a sales account, an opportunity, or a lead. During assignment configuration, carefully consider which of your business objects require assignment, and create work objects only for those.

A set of assignment objects is predefined for the assignment of territories or resources to accounts, partners, opportunities, leads, and deals.
Attributes

For example, you might want to assign a sales representative (resource) to an opportunity (assignment object), based on the risk level of the opportunity. In this case, you will select the attribute of the opportunity work object that corresponds with risk level, and the attribute of the resource candidate object that corresponds with the name or e-mail address. Selecting these attributes makes them available for mappings and for conditions on your rules. Therefore, ensure that you select the attributes that reflect the criteria that you want to use for matching candidate objects to work objects. Some attributes are predefined as assignment attributes for each assignment object.

Related Candidates

Candidate objects are related to work objects and for each relationship, the appropriate assignment mode (such as matching and scoring) and processing options are predefined. You must not modify these predefined settings except for the No Matches Handling option for the Sales Lead work object. The No Match Handling option controls the assignment behavior when no matching candidate is found. By default, this is set to Remove current assignment. You can change this to Retain current assignment which retains the current candidate assignment when no matching candidate is found. You can also change it to Error which throws an error if no matching candidate is found.

Mappings Sets and Mappings

Assignment mapping sets and their related mappings drive territory-based assignment. The mapping sets determine which mappings are used, and the sequence mapping sets are used in territory-based assignment. The mappings identify the dimensions, attributes, and territory filtering used in the assignment processing. Default mapping sets and their related mappings are predefined.

Rule Categories, Rule Sets, and Rules

The application provides default rule categories. These rule categories identify the type of rule processing being performed, such as matching, scoring, classification or territory. Rule sets group the assignment rules and determine the additional processing performed, such as using scores for each candidate and filtering the candidates assigned to top or random matches. Rules are defined to execute rule-based assignment. Rules are designed to return candidates if they match a set of criteria, are within a defined scoring range, or are of a specific classification.

Create rules using work objects, candidate objects, and attributes that you already established. When designing your rules, carefully consider how you want to match candidates to work objects. For example:

- Would you want resources assigned based on their geographic location, their product knowledge, on the status or score of an object, or a combination of any of these attributes?
- Do you want to match candidates only, or would you like to match candidates and score them?
- In a multiple-candidate scenario, do you want to assign all matching candidates or only those who achieve higher than a specific score?

Consider these questions before creating rules.

Related Topics

- Creating Assignment Rules: Examples
- What’s the difference between rule-based and territory-based assignment?

Assignment Mappings
Exporting and Importing Assignment Objects and Rules Setup Data: Explained

This topic explains exporting and importing assignment objects and rules setup data, along with the points to consider while moving the setup data.

Almost all application implementations require moving functional setup data from one instance into another at various points in the life cycle of the applications. For example, in an enterprise application implementation, a development or test instance is first deployed before deploying a production instance. You can move functional setup configurations for assignment objects or assignment rules from one application instance into another by exporting and importing configuration packages from the Manage Configuration Packages page.

To export and import assignment setup data, start by defining an implementation project for the required assignment setup task. The following are some of the examples of assignment tasks:

- Manage Customer Center Assignment Objects
- Manage Service Request Assignment Manager Objects

The Manage Configuration Packages setup task exports the assignment objects or rules setup data.

A configuration package contains the setup import and export definition. The setup import and export definition is a list of setup tasks and their associated business objects that identifies the setup data for export as well as the data itself. You generate the setup export and import definition by selecting an implementation project and by creating a configuration package. The tasks and their associated business objects in the selected implementation project define the setup export and import definition for the configuration package. In addition, the sequence of the tasks in the implementation project determines the export and import sequence.

You can export a configuration package once you create it, or at any time in the future. During export, appropriate setup data is identified based on the setup export definition, and is added to the configuration package. The setup data in the configuration package is a snapshot of the data in the source application instance at the time of export. Therefore, publish the assignment objects and rules before exporting them. After the export completes, you can download the configuration package as a zipped archive of multiple XML files, move it to the target application instance, and upload and import it. Review and publish the assignment objects and rules setup data in the target application instance to make them available for assignment processing.

See the chapter about importing and exporting setup data in the Using Functional Setup Manager guide for more details.

Exporting and Importing Setup Data: Points to Consider

Based on your implementation, you can follow different approaches while exporting and importing assignment setup data.

Consider the following points:

- If your implementation is using only territory-based assignment, the implementation project must include only the Assignment Objects setup tasks.
- If your implementation is using territory-based assignment with rule filtering or rule-based assignment, the implementation project must include both the Assignment Objects and Assignment Rules setup tasks.
- If you are not sure whether your implementation is using territory or rule-based assignment, it is recommended that you include both Assignment Objects and Assignment Rules setup tasks in the implementation project.
- Retain the default sequence for the tasks and business objects.
The application allows you to delete assignment objects, assignment attributes, rule categories, rule sets, rules, and conditions in an environment, for example test. If that setup data is exported, and then imported into another environment, for example production, the data in the target database is not removed.

If your implementation plans to import and export setup data for assignment objects and assignment rules, ensure not to delete assignment objects, rule categories, rule sets, and rules. Set them to inactive in case you want to delete them. Additionally, do not delete assignment rule conditions. Instead, set the rule to inactive and then recreate the rule excluding the condition that is no longer needed.

Related Topics

- Configuration Packages: Explained

Mapping Set Components: How They Work Together

Assignment mapping sets and their underlying mappings drive territory-based assignment. This topic explains how these components work together in assignment processing.

The image below identifies the Sales Cloud business objects that have default mapping sets and mappings associated. Mapping sets and mappings drive territory-based assignment, and the work object attributes map to the territory candidate object dimensions and attributes.

Mappings

The mappings identify the dimensions, attributes, and territory filtering used in the assignment processing. Default mapping sets and their related mappings are predefined for account, lead, partner account, deal, and opportunity revenue assignment. This predefined mapping assumes that opportunities, leads, sales, partners, accounts, and deals use the same territory hierarchy.
Each predefined mapping set has between 9 and 16 mappings that determine the information on the object, such as the account industry or the sales lead product, and how each is mapped to a dimension or attribute on the territory.

You can create additional mappings using the work objects, candidate objects, and attributes that you already established.

### Mapping Sets

Mapping sets enable the grouping of mappings so that you can create more than one mapping for each combination of work object and candidate object. The mapping set concept is used only with territory-based assignment and territory-based assignment with rule filtering. Mappings sets are predefined for accounts, leads, opportunities, partner accounts, and deals. When managing assignment objects, the user can define additional mapping sets, each of which contains multiple mappings, for each combination or work object and candidate object.

### Mapping Types

There are three types of assignment mapping:

- **Dimension Mapping**: Dimension mappings must be used when the work object and candidate object attributes in the comparison are dimension attributes, such as Product. When creating the mapping, use the Function Code field to specify a unique identifier for the dimension. Generally attribute mappings are used when the work object and candidate object attributes in the comparison are non-dimensional attributes. But there are attribute mappings seeded to match the geography and account information on the account with the geography dimension, and account inclusions or exclusions respectively.

- **Attribute Mapping**: This mapping enables you to compare and match attribute values between a work object attribute and a candidate object attribute. When the value of the candidate object attribute matches the work object attribute, the candidate is selected. Attribute mappings are typically used when the work object and candidate object attributes in the comparison are non-dimensional attributes. This type of mapping is also used to capture the mapping between hierarchical dimensions account and geography.

- **Literal Mapping**: Literal Mapping is used almost exclusively to filter the candidate objects. This form of mapping enables the comparison of candidate attributes against a specific value chosen by the user. The assignment engine will compare the mapped candidate object attribute against the specified literal value. For example, select the Territory Candidate object that has the attribute Coverage Model that equals the value PARTNER_CENTRIC.

**Note**: For Literal Mappings, ensure that the value entered corresponds to the Lookup Type Value code, not the meaning.

### Assignment Processing Using Mapping Sets and Mappings

When designing your mappings, carefully consider the dimensions and attributes you use in your territory structure and how you want to match these territory candidates to work objects. Also consider the shape of the information used in the territory structure; this may affect the sequence of each mapping. A sequence can be entered for each mapping set which is used to
determine the order in which these mapping sets will be used in the territory-based assignment processing. The sequence of the dimension mappings used in territory matching can affect performance. The most selective mapping should be given the lowest sequence number. By default, this dimension is the Geography Dimension. By using the lowest sequence number, it is performed earliest in the matching process, which results in the smallest number of territory matches. Mappings that do not have a sequence are used together at the end of the matching process.

Sometimes the mapping set sequence does not matter. For example, there are two predefined opportunity revenue assignment mapping sets. When the first mapping set is used, it finds matching territories based on the information on the opportunity/opportunity account, and the territory information. Then the second mapping set is used which matches territories based on the opportunity/opportunity partner information and the territory information. The order of the mapping sets are interchangeable; regardless of which mapping set is used first, the resulting territories that match will be the same.

In the case of leads, the mapping set sequence is important as the territories matched using the first mapping set may result in a primary partner being added to the lead. This information is significant to the territory matching performed using the second mapping set.

Mapping sets can be made conditional to control whether the mapping set is used or not used during assignment processing. For example, the partner channel manager territory assignment mapping set conditional attribute is set to the value RevenuePartnerId. During the assignment processing of a revenue line, if the Revenue PartnerId attribute for that revenue line contains a value, then this mapping set will be used in territory matching processing.

An indicator in the Related Candidates region controls whether to merge the matching assignment candidates identified from processing each set of mappings. This indicator is used to drive the merging of matching candidates when multiple mapping sets are used in assignment processing. If the box is checked, then the candidates are merged. The default is unchecked.

In most implementations, the predefined mapping sets are sufficient. But mapping sets can offer some flexibility if custom assignment processing is needed.

### Assignment Rules

### Assignment Mappings: Examples

For territory-based assignment, you must create work object to candidate object mappings while creating the assignment object. These mappings are used to make candidate assignments. The scenarios in this topic illustrate creating the following mapping types:

- Attribute mapping
- Dimension mapping
- Literal mapping

#### Creating an Attribute Mapping

Assign territories to an opportunity revenue line when the territory line of business is the same as the opportunity line of business. To create an attribute mapping:

1. Create the following mapping:
   - Work object - Revenue
   - Candidate object - Territory

2. Select the territory when the attribute territory line of business code is equal to the revenue line of business.
3. Enter a value for the sequence which determines the order in which the application uses the mapping when matching territories.

**Note:** Assign the lowest sequence number to the most selective mapping, and the next sequence number to the next most selective mapping.

**Creating a Literal Mapping**

Literal mappings are a way of filtering the matched territories based on specific values of a territory attribute. Find only territories that have an account-centric coverage model assigned to each revenue line. For example, territory coverage model equals SALES_ACCOUNT_CENTRIC.

**Note:** Literal mappings use the code value for lookup-based fields, and not the meaning value.

To create this literal mapping:

1. Select the mapping type **Literal** and optionally enter a sequence value, which determines the order in which the application uses the mapping when matching territories.
2. Select the candidate object **Territory**.
3. Select the candidate object attribute that will be used for filtering. For example, Coverage Model.
4. Select the operator value **Equals**.
5. Select the literal value. In this example, only sales account centric territories must be assigned to revenue lines, so the Literal Value entered corresponds to the code value for the coverage model. For example, SALES_ACCOUNT_CENTRIC.

**Related Topics**

- Creating Assignment Rules: Examples

**Defining Service Request Assignment Rules: Explained**

Assignment rules are used to automatically assign service requests to queues when the service requests are created or updated. Rules can be run on a schedule to automatically assign service requests to a queue when a service request is created or updated.

Service requests are treated as work objects and Queues are treated as candidate objects. Your rules are defined to select the best candidate (queue) for each work object (service request).

**Note:** Service Request Assignment Rules are defined using Rule-Based Assignment. Territory-Based Assignment does not apply to Service Requests.

Defining service request assignment rules requires some forethought. Before beginning this procedure, you must consider the following:

- The attributes of queues you want to use as criteria for your rule assignments.
- The attributes of service requests you want to use as criteria for your rule assignments.
- The rule sets you want to create.
- The rules to include in each rule set.
Manage Service Request Assignment Objects

In this procedure, you select attributes from the service request assignment object that you want to make available in your rules.

To manage service request assignment objects:

1. Sign in as an administrator or a setup user.
2. Navigate to the Setup and Maintenance work area and search for the Manage Service Request Assignment Objects task.
3. Click the task name link in the search results.

The Manage Service Request Assignment Objects page appears.

4. Add the queue attributes you want to be available when setting up your rules:
   a. Click Queue.
   b. Click the Attributes tab.
   c. Add attributes to the list by clicking the + (plus) button, then selecting the View Object Attribute from the drop-down list.
   d. Click Save.

5. Add the service request attributes you want to be available when setting up your rules:
   a. Click Service Request.
   b. Click the Attributes tab.
   c. Add attributes to the list by clicking the + (plus) button, then selecting the View Object Attribute from the drop-down list.
   d. Click Save.

Manage Service Request Assignment Rules

In this procedure you define the rules for service request assignment.

When assigning Service Requests to Queues, follow these guidelines when defining your matching rules:

- The rule set must be defined with Number of Candidates = 1. The application allows only one queue to be assigned to a service request.
- You have the option to select or deselect the Use Score option on a rule set. If you select Use Score, then for every rule in the rule set, you must indicate the amount to increase the score when the rule is true. You must then associate the rule set to queues that receive that score. All of the rules in a rule set are executed, and the Queue with the highest total score is selected.
- If the rule set has multiple rules and you did not select the Use Score option, you must define the criteria for each rule to be mutually exclusive from other rules in the rule set. This ensures that the resulting Queue assigned by the application is predictable in all situations.

To manage service request assignment rules:

1. Navigate to the Setup and Maintenance work area and search for the Manage Service Request Assignment Rules task.
2. Click the task name link in the search results.

The Manage Service Request Assignment Rules page appears.
3. Create a new rule set by clicking the + (plus) button in the Rule Sets work area, and then enter the required information.
4. Create rules for the rule set by clicking the + (plus) button in the Rule Name Rules work area.
   The Create Rule screen appears.
5. Enter a name for the rule in the Name field.
6. From the Rule Applies If drop-down list, select Any conditions met.
7. Add a condition by clicking the + (plus) button in the Conditions work area, and then define the required attribute.
   If an attribute is hierarchical, such as Category Name and Product Group, Not In Including Children and In Including Children operators are displayed as choices. They indicate the following.
   - Not In Including Children: Indicates that the rule applies if the specified attribute value matches the top level of the attribute. This option does not include the attribute values of the children of the current attribute. For example, if the condition is set for the Category Name attribute with value Critical Electronics, the rule applies only if the value of the top level attribute matches Critical Electronics.
   - In Including Children: Indicates that the rule applies if an attribute value matches to any of the attributes in the parent-child hierarchy of the current attribute. For example, if the condition is set for the Category Name attribute with value Critical Electronics, the rule applies even if the value of any of the child attribute matches Critical Electronics.
8. (Optional) Add additional conditions.
9. Select a queue to which the service requests meeting the conditions must be assigned by clicking the + (plus) button in the Action Assign Queue work area.
10. Click Save and Close.

The service request assignment has been defined.

Related Topics
- Managing Queues: Procedure

Assignment Rule Components: How They Work Together

The rule category, rule sets, and rules are components that work together to determine how the assignment engine processes rule-based assignments for work objects.

Rule categories are predefined for each object leveraging assignment rules. Each predefined rule category determines the type of rule processing performed, for example, matching, scoring, and classification.

Depending on the rule category selected, rule sets may allow filters to be used to determine whether all matches are assigned, or a random number of matches. Additionally, a score may be used to allow further filtering of the matching candidates, such as the top X candidates or all above or equal to a minimum score.

At the rule level within a rule set, the action determines the behavior when a rule is evaluated as true. The rule action option works in conjunction with the rule category selected.

The following table describes how the rule set components work together.

<table>
<thead>
<tr>
<th>Mode</th>
<th>Use Score</th>
<th>Filters</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Matching or Territory</td>
<td>X</td>
<td>All</td>
<td>Increase Score By x for each matching or selected candidate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>All Above Minimum Score (set Minimum Score value)</td>
<td></td>
</tr>
</tbody>
</table>
### Rule Category and Rule Set

The rule category selected for the rule set determines the type of rule-based assignment processing to be performed. For example, when the rule category **Sales Lead Resource Rule Category** is selected, the candidates that match the conditions of the rules evaluated as true by the assignment engine are assigned to the work object. The number of matching candidates that are assigned to the work object is determined by the rule set filter settings. Only one rule category can be associated with each rule set.

A rule category is predefined for each type of rule-based assignment processing supported by each Sales Cloud object. For example, the rule category **Sales Team Member Recommendation Default Rule Category** is predefined for resource rule-based assignment of Opportunities, and **Sales Lead Resource Rule Category** is predefined for resource rule-based assignment of Leads. Similar rule categories are predefined for territory rule filtering for revenue lines, territory rule filtering for leads, lead scoring, lead raking, and lead qualification.

Rule categories are created and edited through the Manage Assignment Objects setup task for the relevant application. A rule set contains rules that belong to a specific rule category.

### Use Score

The **Use Score** option determines whether a score is used when identifying matching candidates. The number of matching candidates that are assigned to the work object is also determined by the rule set filter settings.

### Filter Settings

The filter settings are used in conjunction with some rule categories and the rule set **Use Score** option. The filters allow you to indicate how many matching candidates you want to assign to the work object. When set to **All Above Minimum Score**, all of the matching candidates above a particular score are assigned to the work object. Set the score in the **Minimum Score** field.

When set to **Top X**, a number of matching candidates with the highest scores are assigned to the work object. Use the **Number of Candidates** field to specify how many top matching candidates to assign.

When the filter is set to **Random**, a random selection of matching candidates is assigned to the work object. When the rule set **Use Score** option is selected, and the filter is set to **Random**, a random selection of matching candidates with the
highest scores is assigned to the work object. Use the **Number of Candidates** field to specify how many random matching candidates to assign.

**Rules**

One or more rules may be defined for each rule set. Each rule is the distinct set of criteria that is evaluated and candidates or scores that are eligible to assign if the conditions are met. The rule action may apply if all conditions are met, or any conditions are met.

The assignment rule administration allows more than one user at a time to create or update rules that belong to the same or different rule sets or categories. For example, if User A is currently updating assignment rules for the **Sales Lead Resource Rule Category** rule category, then User B can update assignment rules for that same rule category or another rule category at the same time.

**Action**

The action set at the rule level determines the action that is performed when a rule is evaluated as true.

If defining rules to assign resources to an object, you can search for and select the specific resources to be assigned when the rule conditions are evaluated as true.

When a matching rule category is selected, for example, **Sales Lead Resource Rule Category**, the rule action assigns the matching candidates. If a rule with that action is evaluated as true, the candidates that match the conditions for that rule are assigned. The filter setting at the rule set level determines whether all matching candidates are assigned (All), or a random number of matching candidates are assigned (Random).

When a matching rule category and the **Use Score** option are selected, the rule action increases the candidate score by the specified value. If a rule with that action is evaluated as true, the candidates that match the conditions for that rule get the value in the **Action** added to their score. For example, the **Sales Team Member Recommendation Default Rule Category** rule category is selected, and the **Action** for one of the rules in that set is **Increase Score By 10**. If that rule is evaluated as true, the resources that match the conditions for that rule get 10 added to their scores. The scores are cumulative, so if any of the resources that matched the conditions in the rule in the example also match the conditions for other true rules in the set, those resources get additional values added to their current score of 10. The filter setting at the rule set level determines whether all matching candidates are assigned (All), or all matching candidates above a specified score are assigned (All Above Minimum Score), or a random selection of matching candidates with the highest scores are assigned (Random), or a number of matching candidates with the highest scores are assigned (Top X).

When a classification rule category is selected, the rule action is **Set Value To Value Name**. For example, the rule category is **Sales Lead Rule Qualification Rule Category**, the action for one of the rules in that set is **Set Value to Qualified**. If that rule is evaluated as true, the **Status** for the lead being classified is set to **Qualified**.

When the rule category **Sales Lead Scoring Rule Category** is selected, the rule action is **Increase Score By Score Value**. If a rule with that action is evaluated as true, the value in the action is added to the score of the work object associated with the rule set. For example, if the action for one of the rules in that set is **Increase Score By 20**, and that rule is evaluated as true, the score for the Lead is increased by 20.

> **Note:** When you are creating or updating assignment rules, you must click **Save and Publish** to ensure that your changes are live and included in the assignment processing.

**Related Topics**

- Creating Assignment Rules: Examples
Creating Assignment Rules: Examples

Assignment rules are created using rule sets, rules, conditions, and actions. The assignment engine uses your rules to evaluate and recommend candidate assignments for specified work objects. This topic provides scenarios to illustrate the rules you can create.

Creating Service Request Assignment Rules

In this scenario, you assign a service request (SR) to a critical queue if the severity of the SR is High.

> Note: You can assign a service request only to a single queue. Hence, you can’t define rules that each assign the SR to different queues.

To create a rule to assign an SR:

1. Sign in to Oracle Sales Cloud Applications as a service administrator.
2. Navigate to the **Setup and Maintenance** work area.
3. Search for **Manage Service Request Assignment Rules**.
4. In the **Manage Service Request Assignment Rules** page, add a rule set.
5. In the **Manage Service Request Assignment Rules** page, add a rule in the **Create Rule** page. To add a rule:
   
   a. Specify a rule name.
   b. You can optionally specify a description, date from when the rule is going to be effective, and the date when the rule is going to expire.
6. Next, specify a condition and the action to be performed when the condition is satisfied.

   The condition to be specified is, **if the severity of the service request is equal to high**, and the action is to **assign the SR to the Critical_Queue**. To add a condition:
   
   a. Select **Service Request** from the **Object** drop-down list.
   b. Select **Severity** as an **Attribute**.
   c. Select **Equals** as an **Operator**.
   d. Select **High** as a **Value**.
7. Add an **Assign Queue** action, select **Critical_Queue** from the list of queues, and click **Apply**.

> Note: Don’t add more than one Assign Queue actions, because an SR can only be assigned to a single queue.
8. Click **Save and Close**.

Categories

Managing Service Request Categories: Explained

Service request categories can help identify the nature of issues reported in service requests. For example, categories can help group service requests related to hardware in one category, and service requests related to software in another
category. Further categories and child categories can then be created to narrow the type of service request within one of the ordered groupings.

Administrators can create categories and category hierarchies to group and organize service requests depending on their organizational needs. Before creating categories, consider the following:

- Create a list of your top-level categories.
- For each top-level category, create a list of child categories.

To create service request categories:

1. Sign in as an administrator or a setup user.
2. Navigate to the Setup and Maintenance work area and search for the Manage Service Request Categories task.
3. Click the task name link in the search results.

   The Manage Service Request Categories page appears.

4. Create a top-level category:
   a. Click the Create Category drop-down list, and then select Create Top-Level Category.
   b. Enter a name in the Category Name field.
   c. Specify if the category must be active, by selecting a value in the Active drop-down list.
   d. Enter a unique Short Code for the category.
   e. Create additional top-level categories, as needed.

5. Create child categories:
   a. From the Service Request Categories list, select the top-level category for which you want to create child categories.
   b. Click the Create Category drop-down list, and then select Create Child Category.
   c. Enter a name in the Category Name field.
   d. Specify if the category must be active, by selecting a value from the Active drop-down list.
   e. Create additional child categories, as needed.

   The child categories appear indented under the top-level category.

The service request category hierarchy has been created.

FAQs

What happens if I mark an assignment object or one of its attributes as inactive?

When you mark an assignment object as inactive, the selected work or candidate assignment object is not available for assignment processing. When you mark an assignment attribute as inactive, the selected work or candidate object attribute is not available for assignment processing.

Note: The object or attribute cannot be set to inactive if there is a mapping set, mapping, or rule defined using the object or attribute.
6 Managing Catalogs

Defining a Catalog for the Service Offering: Explained

In most implementations, you must create a catalog of products and services. If you have already defined a catalog with the Base usage for Sales, it can be used in the Service offering. Alternatively, you have the option to create and manage a distinct catalog for the Service offering.

Before deciding whether to create a distinct catalog for the Service offering, consider that using the same catalog as Sales means you have the same hierarchy of product groups used to categorize service requests. For some implementations you can use the same catalogs. However, in other implementations the Sales catalog might not have the right granularity to properly categorize service issues. In these situations it would be appropriate to create a separate hierarchy of product groups and products, specifically for the Service offering.

Using an Existing Sales Catalog for the Service Offering

To use the same catalog for your Service offering that you use for your Sales implementation, you must add the root product group for the Sales catalog in the Service offering.

To use an existing Sales catalog in your Service offering:

1. Sign in as an administrator or a setup user.
2. Navigate to the Setup and Maintenance work area and search for the Manage Product Group Usage task.
3. Click the task name link in the search results.
4. Click the Service usage.
5. Under the Service: Details section, in the Product Groups tab, add the root product group for the sales catalog.
6. Save the record.

Defining a Distinct Catalog for the Service Offering

Defining a catalog for the Service offering is the same procedure that you use for Sales. The only difference is that for Product Group Usage, Sales uses the Base usage, whereas Service uses Service usage. Use the following procedure to begin defining a catalog for the Service offering. Use the related Sales documentation to complete this procedure.

To begin defining a distinct catalog for the Service offering:

1. Sign in as an administrator or a setup user.
2. Navigate to the Setup and Maintenance work area and search for the Manage Product Group Usage task.
3. Click the task name link in the search results.
4. Click the Service usage.
5. Create your catalog of products and services for the Service offering.

Related Topics

- Sales Catalog Setup Overview
- About the Sales Catalog
Creating the Root Product Group

Sales Catalogs: Overview

Using sales catalogs in Oracle Sales Cloud lets you:

- Use product group as a territory dimension so that assignments can be made based on product.
- Give salespeople a mechanism to add product revenue to opportunities.
- Allow salespeople to add products to leads.
- Have product revenue available in forecasting and salesperson quota.

Note: While you can include individual products (also known as inventory items) in your catalog, they are not required unless you are integrating with an order management system downstream, such as Oracle Configure, Price and Quote (CPQ) Cloud. For information on the setup of individual products, see the topics on Sales Cloud products.

To get started creating your sales catalog, see the topic, Creating the Sales Catalog: Getting Started.

Sales Catalog Key Features

The following are the main features of the sales catalog:

- Quickly build and deploy sales catalogs in a single administration UI.
- Catalog administration tool allows you to build product groups in a hierarchy.
- Product group display name and description can be translated into different languages.
- Use file-based import to import product groups rather than having to enter them in the UI.
- Use the sales products UI to create individual products that you then can add to the product group hierarchy.
Product Group Hierarchy Example

The following figure shows an example of a product group hierarchy.

```
  Special Deals
     |     |     |
    Men  Women  Kids
     |     |     |
   Girls  Boys
     |     |
   Apparel
     |     |
   Pants  T-shirts  Dresses
```

Related Topics

- Validating the Sales Catalog
- Running Refresh Denormalized Product Catalog Table Process
- Creating a Sales Catalog: Worked Example

Creating the Sales Catalog: Getting Started

Sales catalogs organize the products and services that you sell in a hierarchy of product groups. Your salespeople select product groups from the sales catalog when they create leads and opportunities, so you must create at least one sales catalog. You can also use the product groups as a dimension for defining sales territories and for preparing management reports.

High-Level Setup Steps

You must perform several steps to set up the sales catalog. The following table shows the high-level setup steps and where to find more information about the step.
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Where to Find More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create the root product group.</td>
<td>Create the root product group. The root catalog or root product group is the top of the product group hierarchy. All other product groups are nested underneath. Perform this step in the product groups pages in Setup and Maintenance.</td>
<td>Creating the Root Product Group section in this topic</td>
</tr>
<tr>
<td>Create the product group hierarchy.</td>
<td>Add additional product groups to create the catalog hierarchy of product groups and subgroups. You can add the product groups manually in the product groups pages in Setup and Maintenance, or you can import them from a file.</td>
<td>• Creating the Product Group Hierarchy section in this topic</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The topic, Importing Product Groups in the Oracle Sales Cloud - Getting Started with Your Implementation guide</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• The Importing Product Groups chapter of the Oracle Sales Cloud - Understanding File-Based Data Import and Export guide</td>
</tr>
<tr>
<td>Publish the sales catalog.</td>
<td>Publish the product group hierarchy that makes up the sales catalog. Perform this step in the product groups pages in Setup and Maintenance.</td>
<td>• Publishing the Sales Catalog section in this topic</td>
</tr>
<tr>
<td></td>
<td>When you publish a catalog, the scheduled process, Refresh Denormalized Product Catalog Table for BI, runs automatically to update the current view of the product group hierarchy in consuming applications.</td>
<td>• Running Refresh Denormalized Product Catalog Table topic</td>
</tr>
<tr>
<td>Set the catalog’s usage to Base.</td>
<td>To enable a sales catalog for use in Oracle Sales Cloud, you associate it with a &quot;usage&quot; called the Base usage. Perform this step in the product groups pages in Setup and Maintenance. Each time you make a new assignment of Base to a root product group, you must run the scheduled process, Refresh Denormalized Product Catalog Table for BI. If you do not run the process, your product group hierarchy may not appear in the consuming applications.</td>
<td>• Enabling the Sales Catalog topic</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Running Refresh Denormalized Product Catalog Table topic</td>
</tr>
<tr>
<td>Set the browse catalog profile option.</td>
<td>Set the profile option, Browse Sales Catalog in Opportunities Enabled, to Yes to enable Browse Sales Catalog button on the Products table in the simplified UI. Perform this step in the Manage Opportunity Profile Options task in Setup and Maintenance.</td>
<td>Enabling the Sales Catalog topic</td>
</tr>
<tr>
<td>Set usage options for searching and browsing.</td>
<td>If you have set up the browse catalog feature, configure search and browse options.</td>
<td>Setting Options for Sales Catalog Searching and Browsing topic</td>
</tr>
<tr>
<td>Verify your setups.</td>
<td>After you have published and enabled your catalog, you will want to validate that the product groups are appearing in leads and opportunities.</td>
<td>Validating the Sales Catalog topic</td>
</tr>
</tbody>
</table>
### Creating the Root Product Group

The root product group is the top-level product group in your catalog. The display name you use appears in the UI for users.

Use the following procedure to create the root product group.

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the **Manage Product Groups** task. The Manage Product Groups page appears.
3. Click the **Create** icon.
4. In the **Name** field, enter a unique name without spaces. This is the internal name of the group.
5. In the **Display** field, enter the product group display name. This is the name that displays in the UI to users.
6. Optionally, enter a description.
7. Optionally, enter the effective start and end dates.
8. Select the following check boxes:
   - **Active**: Only active product groups are available for use in the consuming applications.
   - **Root Catalog**: The root catalog is the top product group in the hierarchy. All other product groups created under it are considered subgroups. You can only add root catalogs to the Base usage in the Manage Product Group Usage page. Adding your catalog to the Base usage is a required step to enable the catalog for use in consuming applications.
Locked: This check box may already be checked. A product group must be "locked" to be edited.

9. Deselect the Allow Duplicate Children check box. This ensures that product groups and products do not appear multiple times in the hierarchy.

10. Click Save and Close.

11. Verify that the root product group appears in the left pane.

Creating the Product Group Hierarchy

If you are manually creating the product group hierarchy in the UI, create the remaining product groups under the root product, using the following steps:

1. Ensure that your root product group appears in the left pane.

   Tip: To show the catalog in hierarchy mode so that you can see the nesting of the product groups, click the hierarchy icon in the left pane.

In the following figure, the image on the left shows the hierarchy icon above the catalog name in the left pane of the Manage Product Groups page. Click the icon to view the product group in hierarchy mode. To return to folder view, click the hierarchy icon again, as shown in the image on the right.

2. In the Manage Product Groups page, click the Subgroups tab in the main work area.

   The product group information for the selected group appears in the main work area.

   Tip: A product group must be "locked" to be edited, so ensure that the parent of the product group you are creating is locked.

3. Click the Create icon.

4. In the Create Subgroup dialog box, enter the product group information.

   - In the Name field, enter a unique name without spaces.
   - In the Display field, enter the product group display name.
Optionally, enter a description.
Optionally, enter the effective start and end dates.
Select the following check boxes:

- **Active**: Only active product groups are available for use in the consuming applications.
- **Root Catalog**: Do not select the Root Catalog check box. You can have only one root catalog.
  Deselect the Allow Duplicate Children check box. This ensures that product groups and products do not appear multiple times in the hierarchy.

5. Click **Save and Close**.
6. Verify that the product subgroup is visible in the left pane. If the new subgroup does not appear, then click **View** and then **Refresh**.
7. Repeat the steps to create additional levels in your sales catalog hierarchy.

### Publishing the Sales Catalog

After you create your product group hierarchy, use the following steps to publish your sales catalog. You must publish the root group at minimum, to be able to associate it to the Base usage. See the topic, Enabling the Sales Catalog, for more information.

1. Lock the root product group and the remaining groups in your hierarchy that you want to make available to end users.
2. Select the root group and click the **Publish** button.

⚠️ **Caution**: When you publish a node in the hierarchy, the application attempts to also publish all of the locked product groups. Therefore, if you have product groups in the application that you do not want published, be sure to unlock them so that they do not get published with the root and its subgroups.

3. Click **Yes** in the Confirm Publish dialog box.
4. Click **OK** on the confirmation message that is displayed.
5. Click **Save and Close**.

### Related Topics

- Validating the Sales Catalog
- Running Refresh Denormalized Product Catalog Table Process
- Best Practices for Sales Catalog Setup

### Adding Products to the Catalog: Procedure

After you have created products, you can add them to the product groups that make up the sales catalog hierarchy.

The source for your products can be either products created in Oracle Sales Cloud Products screens or in the Oracle Supply Chain Management (SCM) Cloud Products screens. For more information on product creation, see the topics about sales products.
Adding Products to the Catalog

Use the following procedure to add products to the sales catalog product group hierarchy.

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Product Groups task.

The Manage Product Groups page appears.

3. In the Manage Product Groups page, in the product group hierarchy, select the product group that you are adding products to.
4. Lock the product group for editing by clicking the **Lock** button.
5. Click the **Products** tab for the product group you selected.
6. In the **View** filter at the top of the screen, ensure that the Administration view is selected.
7. In the products table, select **Actions - Select and Add**.

The Select and Add: Products window appears.

8. Search for and select the product you're adding.
9. Click **Apply** and then **OK** in the select and add window.

The application returns to the Manage Product Groups page with the product added to the product group.

10. Click the **Publish** button to publish the product group.
11. Click **Yes** in the Confirm Publish dialog window and then dismiss the confirmation message.

The product group is automatically published.

12. Save your changes.

Related Topics

- Validating the Sales Catalog
- Running Refresh Denormalized Product Catalog Table Process
- Sales Products: Overview

Enabling the Sales Catalog

After you have created your product group hierarchy in Oracle Sales Cloud and optionally added individual products (items), you must enable the sales catalog for use in the consuming applications, such as opportunities and leads.

To enable the sales catalog, perform the following steps:

1. Set the Browse Sales Catalog profile option. This optional step enables the display of the browse button in the UI.
2. Associate the catalog with Base usage: This required step makes the catalog visible in the consuming applications.

Set the Browse Sales Catalog Profile Option

Set the profile option, Browse Sales Catalog in Opportunities Enabled (MOO_ENABLE_BROWSE_CATALOG), to Yes to enable Browse Sales Catalog button on the Products table in the simplified UI. Use the following steps:

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the task, Manage Opportunity Profile Options.

   The Manage Opportunity Profile Options page appears.

3. In the search region, enter Browse Sales Catalog in Opportunities Enabled in the Profile Display Name field.

4. Click Search.

5. In the list that is returned, click on the profile option name link.

6. Set the profile option value to y.

7. Save your changes.

Associate the Root Catalog with Base Usage

To enable a sales catalog for use in Oracle Sales Cloud, you associate it with a “usage” called the Base usage. Use the following steps:

1. In Setup and Maintenance, search for and select the Manage Product Group Usage task.

   The Manage Product Group Usage page appears.

2. In the Manage Product Group Usage page, select the Base record.

   Tip: If a product group is already associated with the Base usage in the Details section in the portion of the screen, then you can remove the product group by selecting it and clicking the Delete icon.

3. In the Details section, click the Select and Add icon.

4. In the dialog box that appears, search for the root catalog that you just created.

5. Select the record and click OK.


   Important: Each time you make a new assignment of Base to a root product group, you must run the scheduled process, Refresh Denormalized Product Catalog Table for BI. If you do not run the process, your product group hierarchy may not appear in the consuming applications. See the topic, Running Refresh Denormalized Product Catalog Table Process, for more information.

Related Topics

- Validating the Sales Catalog
- Running Refresh Denormalized Product Catalog Table Process
- Best Practices for Sales Catalog Setup

Validating the Service Catalog

After you have published and enabled your catalog, validate that the product groups are appearing in service requests. Use the following procedure.

1. Sign in as a service manager or service representative.

2. Navigate to Service Requests and create a service request.

3. In the Create Service Request page, click the Product drop-down list, and click Search.
4. Ensure that your product catalog is displayed in the **Select: Product** page.

**Related Topics**

- Running Refresh Denormalized Product Catalog Table Process
- Best Practices for Sales Catalog Setup
7 Setting Up Social Networking

Initial Tasks

Enabling Oracle Social Network Objects for Service Requests: Explained

Optionally, you can configure service requests to be sharable on Oracle Social Network. This feature enables customer service representatives to start conversations, share documents related to service requests, and solicit input from other resources in sales, service or elsewhere in the enterprise.

To enable Oracle Social Network for service requests:

1. Sign in as an administrator or setup user.
2. Navigate to the Setup and Maintenance work area and search for the Manage Oracle Social Network Objects for Service task.
3. Click the task name link in the search results.
   The Manage Oracle Social Network Objects for Service page appears.
4. Expand the Service name, and then click Service Request.
5. Click the Enable Object button.
6. In the Service Request Enable Object dialog box, select Manual, then click OK.

   Note: Although you can select Automatic, doing so means every service request created is shared on Oracle Social Network, which is typically not recommended. Selecting Manual indicates that the user can explicitly share service requests only when collaboration is required.

7. Define the service request attributes that you want to share by clicking the + (plus) button in the Business Object Attributes work area.
8. Click Save.

Oracle Social Network is enabled for service requests.

Note: Once Oracle Social Network is enabled, use your Service Request page layouts in Application Composer to control whether the Social (OSN) subtab is available to specific user roles.

Related Topics

• About Setting Up Oracle Social Network
• Dynamic Page Layouts: Explained
Social Networking: Overview

Oracle Social Network is a secure, private social network that integrates with Oracle Sales Cloud and connects you with all your colleagues.

You can use Oracle Social Network for:

- Discussing projects, plans, and issues in public forums, membership groups, or one-on-one.
- Reviewing and publishing files.
- Following the daily activities of the people you choose.

The real power of Oracle Social Network is how easily it integrates with common sales objects. For example, you can bring an Oracle Sales Cloud opportunity into a Conversation where you can discuss it, plan around it, and share it. You can take the opportunity from possibility to realization without losing any of the casual and formal information that flows from all of this activity.

With Oracle Social Network, you and your teams have the tools you need to collaborate, capitalize on collective experience, and make informed business decisions.
Setting Up Outbound E-Mail

Defining Email Templates: Procedure

You can create email templates for Forward, Response, and System Response messages of a service request (SR). You can create custom templates using HTML to send email notifications for an SR to define an email template, use the following procedure. For more information, see the Oracle Sales Cloud Customizing Sales guide.

1. Create a sample HTML file for email message using any HTML authoring tool. You can use SR fields within the email content. For example, the message can be "This is an update about SR [SRNumber] ".
2. Log on to Oracle Cloud application as an administrator.
3. Navigate to Application Composer.
4. Select Service application.
5. In the Email Templates page, click + to create a new template.
6. Select Service Request as an Object.
7. Specify a name for the template.
8. Specify a description.
9. To add any attachments, click +, browse to the file location, and select the file.
10. A template is active by default. To disable the template, clear the Active option.
11. Specify the email subject. You can use SR field names in the subject. For example, subject can be Resolved issue [$Title$].
12. Copy the message HTML code and paste it in the content of the email. Add #MessageContent# tag anywhere in the HTML code. This tag is replaced by the SR message content.
13. In emails templates that are meant for forwarding to internal users, you can include a link to the SR within the template. Include the link in the following format:

   <Link to company's engagement cloud site>/service/faces/FuseOverview?fndGlobalItemNodeId=itemNode_service_service_requests&pSrNumber=<SR Number>.

   For example, https://company123.us.oracle.com:10616/service/faces/FuseOverview?fndGlobalItemNodeId=itemNode_service_service_requests&pSrNumber=SR0000029093.
14. Click Save and Close.

Related Topics

- E-Mail Templates: Explained

Enabling Service Request Outbound E-Mail: Explained

You can enable automatic e-mail notifications for service requests. E-mail notifications are sent when an internal resource posts a response message to a service request. This topic describes how to enable outbound e-mails for service requests.

To enable outbound e-mails for service requests:

1. Sign in as an administrator or a setup user.
2. Navigate to the **Setup and Maintenance** work area and click **Service**.

3. Click the **Actions** drop-down list, then select **View Configuration**.

   The **Configure Service** page appears.

4. For the Service offering, click **Features**.

5. Select the **Service Request Outbound E-mail** check box.

6. Click **Done**.

The ability to send service request outbound e-mails is now enabled.

The next task is to create e-mail templates for responses to customers and for forwarding the service request to others. Once you have created the templates, specify the template names on the Manage Service Request E-mail Message Profile Options task.

**Related Topics**

- E-Mail Templates: Explained

---

**Managing Service Request E-Mail Message Profile Options: Explained**

When service request outbound e-mail messages have been enabled, you can configure various options relating to the service request e-mail message. The following table lists all of the service request e-mail message profile options that you can configure with descriptions of what each one does.

<table>
<thead>
<tr>
<th>Profile Option Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SVC_SR_EMAIL_ATT_SIZE</td>
<td>Specifies the maximum size, in MB, of all the attachments on a service request e-mail.</td>
</tr>
<tr>
<td></td>
<td>If the user exceeds the maximum size, the message is not sent.</td>
</tr>
<tr>
<td>SVC_SR_EMAIL_FAILURE_NOTIFICATION</td>
<td>Specifies whether to post a message to the service request if an e-mail response or forward could not be sent successfully.</td>
</tr>
<tr>
<td>SVC_SR_EMAIL_SUCCESS_NOTIFICATION</td>
<td>Specifies whether to post a message to the service request if an e-mail response or forward is sent successfully.</td>
</tr>
<tr>
<td>SVC_SR_FORWARD_TEMPLATE_NAME</td>
<td>Specifies which e-mail template to use for service request forward messages.</td>
</tr>
<tr>
<td></td>
<td>The e-mail template is created and saved in Application Composer. The value of this profile option must match the exact name of the template that is created in Application Composer.</td>
</tr>
<tr>
<td>SVC_SR_RESPONSE_FROM_NAME</td>
<td>Specifies the From account name of the e-mail of the service request e-mail response and forward.</td>
</tr>
<tr>
<td>SVC_SR_RESPONSE_REPLYTO_EMAIL</td>
<td>Specifies the reply-to e-mail for service request e-mail responses and forwards.</td>
</tr>
<tr>
<td>SVC_SR_RESPONSE TEMPLATE_NAME</td>
<td>Specifies which e-mail template to use for service request response messages.</td>
</tr>
<tr>
<td>Profile Option Name</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>SVC_SR_FORWARD_TEMPLATE_NAME</td>
<td>Specifies the e-mail template name for SR messages of type Forward. The e-mail template is created and saved in Application Composer. The value of this profile option must match the exact name of the template that is created in Application Composer.</td>
</tr>
</tbody>
</table>

To manage service request e-mail message profile options:

1. Sign in as an administrator or a setup user.
2. Navigate to the **Setup and Maintenance** work area and search for the Manage Service Request E-mail Message Profile Options task.
3. Click the task name link in the search results.

   The **Manage Service Request E-mail Message Profile Options** page appears.

   **Note:** The options in the next steps will not appear in environments where **Service Request Outbound E-mail** has not been enabled.

4. Click an option.
5. Make your modifications.
6. Click **Save and Close**.

   **Note:** You create e-mail templates are created using Application Composer.

**Related Topics**

- E-Mail Templates: Explained
- Object Workflows and E-Mail Notification: How They Work Together
9 Understanding Analytics and Reports

Service Requests Analytics and Reports: Explained

Service Request Management includes nine infolets and corresponding detail reports, that show key performance indicators (KPIs) important to customer service representatives and customer service managers.

You can also create custom analyses based on your requirements using Oracle Transactional Business Intelligence (OTBI) tools. Prebuilt and custom infolets can be displayed on the Service Infolets page. To access the Service Infolets page, click the toggle on your home page. Click each infolet to navigate to a corresponding detailed report for additional information.

For information about the procedure to enabling infolets on your dashboard, see Enabling the Prebuilt Sales Infolet Page for Each Sales Role. The procedure to enabling a service infolet for each service role is the same as for a sales role. For information about building custom analytics, see Sales Cloud Creating Analytics for Oracle Transactional Business Intelligence Enterprise.

Service Roles for Service Request Analytics

The service request analytics and reports are displayed to service representative and service manager job roles. OTBI secures reporting objects and data through a set of delivered OTBI Transaction Analysis duty roles. These duty roles are assigned to the service representatives and service managers and determine what reports and analyses can be accessed by each. These OTBI transaction analysis duty roles controls which subject areas and analyses a user can access. These roles also determine what data a user can see in her service requests.

Your administrator can determine which users, application roles, and catalog groups have the following privileges:

- Receive the delivery content of an agent.
- Have permission to access a section or alert section in a dashboard.
- Have permission to use a saved customization.
- Have permission to add or edit for an existing catalog group
- Assign permissions to a catalog object.

For information about setting the required security options, see Security Guide for Oracle Business Intelligence Enterprise Edition.

The OTBI transactional analysis duty roles for service are described in detail in the topic About Security Roles: Explained. The following table lists analyses and reports available for service requests, and the job and duty role mapping required for a user to access them:

<table>
<thead>
<tr>
<th>Analytic or Report Name</th>
<th>Job Role</th>
<th>OTBI Transactional Analysis Duty Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agents with Most Pending Service Requests</td>
<td>Customer service manager</td>
<td>Service Managerial Transaction Analysis Duty</td>
</tr>
<tr>
<td>Long Wait on Agent</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Queues by Unassigned Service Requests</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Team Resolve Time</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Understanding Infolets for Service Requests

For the prebuilt service roles, each role has a customized dashboard. For custom roles, administrators must enable the **Service Infolet** page for each new role. For the prebuilt service roles, the **Service Infolet** page offers the following prebuilt key performance indicators (KPIs). These KPIs focus on the most important service requests and highlight the trouble spots. You can customize the infolets page by selecting the prebuilt infolet that shows the KPIs, editing the existing KPIs, or creating custom KPIs to meet your business needs. Click the infolet KPIs for quick access to detailed information.

A service representative’s **Service Infolets** page includes the following KPIs:

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Resolve Time</td>
<td>Shows the average time taken by the user to resolve the service requests, that are assigned to the user, in the last 30 days. In addition, it displays the average time taken by all agents to close the service requests assigned over the last 30 days. The details compare the user’s average time with the average time taken by all agents together over the last 30 days.</td>
</tr>
<tr>
<td>Pending Tasks</td>
<td>Displays the number of pending tasks that are assigned to the user and contains the following information:</td>
</tr>
<tr>
<td></td>
<td>• Tasks that are of high priority.</td>
</tr>
<tr>
<td></td>
<td>• Tasks that are of medium priority.</td>
</tr>
<tr>
<td></td>
<td>• Tasks that are of low priority.</td>
</tr>
<tr>
<td></td>
<td>• Tasks that are past their due date.</td>
</tr>
<tr>
<td>Waiting on Customer</td>
<td>Displays an overview of the service requests that are waiting on the customer and contains the following information:</td>
</tr>
<tr>
<td></td>
<td>• Number of service requests in the Waiting status.</td>
</tr>
<tr>
<td></td>
<td>• Number of service requests that are resolved.</td>
</tr>
<tr>
<td></td>
<td>• Total number of service requests assigned to the user, that is both resolved and waiting on the customer.</td>
</tr>
<tr>
<td></td>
<td>• Total number of critical service requests assigned to the user, that is both resolved and waiting on the customer.</td>
</tr>
<tr>
<td>Waiting on Me</td>
<td>Displays an overview of the service requests that are waiting on the user. The infolets contains the following information about the service requests waiting on the user:</td>
</tr>
<tr>
<td></td>
<td>• Number of new service requests.</td>
</tr>
<tr>
<td></td>
<td>• Number of services requests that are in progress.</td>
</tr>
<tr>
<td></td>
<td>• Total number of service requests that are awaiting a response from the user and are in progress.</td>
</tr>
<tr>
<td></td>
<td>• Total number of unresolved service requests that are assigned the user and are in the critical status.</td>
</tr>
</tbody>
</table>
A service manager’s **Service Infolets** page includes the following KPIs:

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agents with Most Pending Service Requests</td>
<td>Displays the top three agents that have the most pending service requests, and the number of service requests that are pending. Pending service requests are requests that are in a New or In progress state, and are pending action by the agent. These do not include the requests that are waiting on the customer.</td>
</tr>
<tr>
<td>Long Wait on Agent</td>
<td>Number of service requests that are waiting on the agent for longer than 24 hours.</td>
</tr>
<tr>
<td>Queues by Unassigned Service Requests</td>
<td>Number of unassigned service requests in each queue. The graph also displays the priority of the service requests in the queues.</td>
</tr>
<tr>
<td>Team Resolve Time</td>
<td>The average resolution time of the service requests resolved in the last 30 days, by any user in the signed in service manager’s team. The time is displayed in number of days, hours and minutes.</td>
</tr>
<tr>
<td>Critical Service Requests</td>
<td>The average resolution time of the service requests resolved in the last 30 days, by any user in the signed in service manager’s team.</td>
</tr>
</tbody>
</table>

The procedure for customizing your Infolets layouts is described in detail in Oracle Sales Cloud Using Analytics and Reports.

**Related Topics**

- About Security Roles: Explained
- Sales Cloud Using Analytics and Reports
- Sales Cloud Creating Analytics for Oracle Transactional Business Intelligence Enterprise
- Enabling the Sales Infolet Pages

**Customizing Reports: Explained**

This table shows some of the types of customizations that you can make to business intelligence (BI) analytics and reports, and the corresponding tools to use to customize. For more information, see the Creating and Editing Analytics and Reports guides relevant to your products.

<table>
<thead>
<tr>
<th>Customization</th>
<th>Tool</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create report layout</td>
<td>Layout editor in the BI application or external applications, such as Microsoft Word</td>
</tr>
<tr>
<td>Customize report layouts</td>
<td>Layout editor in the BI application or external applications, such as Microsoft Word</td>
</tr>
<tr>
<td>Create a report</td>
<td>The BI application</td>
</tr>
<tr>
<td>Customize analyses</td>
<td>Reports and Analytics pane or the BI application</td>
</tr>
<tr>
<td>Customization</td>
<td>Tool</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Customize dashboards</td>
<td>The BI application</td>
</tr>
</tbody>
</table>

For more information about Oracle Business Intelligence Tools documentation, see http://docs.oracle.com/en/applications/biapps.html

**Related Topics**

- Customizing Sales Cloud Analytics and Reports: Overview
10 Understanding Customization, Extensibility, and Integration

Extending Oracle Cloud Applications: Explained

Use Application Composer to customize and extend Oracle Engagement Cloud. For example, you can customize service requests, messages, and queues. To learn more about Extensibility, see Oracle Sales Cloud Customizing Sales guide.
11 Export and Import

File-Based Data Import and Export: Overview

You can import and export a wide range of application data using file-based data import and export in Oracle Engagement Cloud. Only users with the Service Request Administrator duty role can import and export objects. For example, you can use the file-based data export feature to export object data so that you can then import it into another instance. You can also import records to the applications so that you don’t have to create the records in the user interface. For more information, see the Oracle Sales Cloud - Understanding File-Based Data Import and Export guide.

Importing Objects

You can import Service Request (SR), Queue, and Category objects using the file-based import.

To create a new file import activity, sign in to the Fusion Service Manager as an administrator, and search for the task File Import Activity. From the list of tasks in the search results, click Manage File Import Activities.

*Note:* The optimal batch size for importing is 50,000 records at a time. You may have performance issues if your files exceed 50,000 records.

Before you import service requests, queues, or categories, you must first import the following dependant objects:

- Accounts: The list of accounts that can be associated with the SR. Selecting an account is mandatory when creating a SR. For more information about importing accounts, see Importing Accounts in the Oracle Sales Cloud Understanding File-Based Data Import and Export guide.
- Contacts: The list of contacts for each account that can be associated with the SR. For information about importing contacts, see Importing Contacts in the Oracle Sales Cloud Understanding File-Based Data Import and Export guide.
- Employee Resources: The list of employee resources to which you can assign work objects in the SR. For information about importing employee resources, see Importing Employee Resources in the Oracle Sales Cloud Understanding File-Based Data Import and Export guide.
- Partners: The list of partner accounts that you can associate with an SR. For information about importing partners, see Importing Partners in the Oracle Sales Cloud Understanding File-Based Data Import and Export guide.
- Product Groups: A product group is a group of related products. For information about importing product groups, see Importing Product Groups in the Oracle Sales Cloud Understanding File-Based Data Import and Export guide.
- Products: List of products against which you can raise an SR. For information about importing products, see Asset: List of assets associated with the account. For information about importing assets, see Importing Products in the Oracle Sales Cloud Understanding File-Based Data Import and Export guide.
- Categories: The categories associated with the service requests.
- Queues: The queues to which your SRs are assigned.

The following list describes the sublevel objects that you can import for each SR, queue, and category.

- Service Requests
  - Messages
• Contact Members
• Resource Members
• References

• Queues
  • Queue Party Resources
  • Queue Team Resources

• Categories
  • Service categories

Note:
  • The import facility doesn’t support importing hierarchical data directly. To import category hierarchies, such as parent and child relationships, you must import the category data twice. The first time you import the file, the object data is added, and the second time you import the same file, the relationships are created.
  • Since the service request data is dependent upon queues and categories, you must import the queues and categories before importing your service requests.

After you import the dependant objects, create an import activity to upload details of objects you want to upload. Importing an object involves completing the following steps:

1. Set up the import options.

   You select the object you’re importing, specify the file format and different import options, and upload the file with your data. The options that are available depend on the object that you’re importing. Some import objects, for example, permit you to upload a zip or Java archive (JAR) file of attachments. These attachments are then attached to the records in the application after the data file import is complete.

2. Map the fields.

   For this task, you create a mapping of the data in your file and the attributes in the application. You can also reuse a mapping that you have created in past import activities or use the Manage File Import Mappings task. Any mapping you create in an activity is automatically saved. This mapping can be reused in subsequent imports and can be managed using the Manage File Import Mappings task.

3. Schedule the import.

   You can schedule to run the import at a time you specify or run it immediately.

4. Review and activate the import activity.

   Review your import details and click Activate to activate the import activity.

You can use predefined .csv templates for your service requests, queues, and categories that are provided in the application. For more information about using predefined templates for objects, see Using Predefined Templates to Import Data Through File-Based Data Import. For more information about importing objects, see File-Based Import Objects and Target Objects. You can also import custom objects. For more information, see File-Based Data Import and Export of Custom Objects: Explained.
Exporting objects

You can extract large volumes of data from the Oracle Engagement Cloud using bulk export. You can either extract a full set of records for an object, or perform incremental extracts. For example, you can extract complete set of service requests data or extract updated set of records every week.

Bulk export creates comma separated or tab delimited files, which are attached to the export process. For more information about bulk export components and procedure, see Understanding Bulk Export.

Related Topics

- File-Based Data Import and Export: Overview
- Using Predefined Templates to Import Data Through File-Based Data Import
- File-Based Data Import and Export of Custom Objects: Explained

Bulk Export: Overview

You can extract large volumes of data from Oracle Sales Cloud objects using bulk export. You can either extract a full set of records for an object, or perform incremental extracts. For example, you can extract complete set of account data or extract updated set of records every week. Bulk export creates comma separated or tab delimited files, which are attached to the export process.
The following figure depicts the process of selecting data for export, scheduling and delivering the data file.
Glossary

**analysis**
A selection of data displayed in one or more views, such as a table or chart, to provide answers to business questions.

**analytics**
Business intelligence objects such as analyses and dashboards that provide meaningful data to help with decision making.

**dashboard**
A collection of analyses and other content, presented on one or more pages to help users achieve specific business goals. Each page is a separate tab within the dashboard.

**lookup code**
An option available within a lookup type, such as the lookup code BLUE within the lookup type COLORS.

**lookup type**
The label for a static list that has lookup codes as its values.

**profile option**
User preferences and system configuration options that users can configure to control application behavior at different levels of an enterprise.

**report**
An output of select data in a predefined format that’s optimized for printing.