Oracle
Sales Cloud
B2C Customization Guide
Release 12
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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 provides information on how sales administrators and managers can customize their Oracle Sales Cloud application for use with a Business to Consumer (B2C) environment.

This guide describes how to customize Oracle Sales Cloud for use in a B2C environment, including minor customizations required to the springboard and to the following objects for use with B2C:

- Contact
- Activity
- Opportunity
- Lead

Related Guides

You can refer to the following guides to learn more about customizing Oracle Sales Cloud.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud Getting Started with Oracle Sales Cloud Customizations</td>
<td>Introduces you to user interface elements, user interface types, and simple, common customizations of Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Customizing Sales</td>
<td>Describes how to create and extend objects and customize the user interfaces and navigation menus.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Groovy Scripting Reference for Application Composer</td>
<td>Explains the basics of how to use the Groovy scripting language to enhance Oracle Sales Cloud.</td>
</tr>
</tbody>
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Related Topics

- Oracle Help Center
2 Introduction to B2C Customizations

Customizing Oracle Sales Cloud for B2C: Overview

Regardless of the type of sales environment you’re in -- whether Business to Business (B2B) or Business to Consumer (B2C) -- Oracle Sales Cloud meets your needs with almost no changes required. Only one area is specifically optimized for B2B, and that’s in the area of account and contact management. This means that, if you’re in a B2C environment where your end users sell directly to individual people (and not to businesses or corporations), then you must first make some minor customizations so that your users can more easily track those people (consumers). Read this guide to learn how to enable a B2C deployment of Oracle Sales Cloud.

Where are Changes Required?

If your users are selling directly to individual people in a B2C environment, then you’ll make similar changes across these objects:

- Contact
- Opportunity
- Activity
- Lead

You’ll also make changes to the springboard itself.

What Changes are Required?

In general, you’ll make similar changes across all objects.

For example:

- You’ll change the field label from Account to Customer, for some pages.
- You’ll showing various fields for household use, where required.

This guide describes the above changes in detail, as well as additional changes that are specific to each object.
3  B2C Setup for Contacts

Customizing the Contact Pages for B2C: Overview

B2C transactions are sold to individuals directly, rather than to customer accounts. To reflect sales to individuals, you must perform some setup tasks to allow users to communicate with prospects or individual customers rather than account contacts.

This chapter describes how to customize the Contact pages for B2C. It includes the following topics:

- Setting the Default Contact Type
- Customizing the Contact Create and Edit Pages
- Hiding My Business Contacts from List Management
- Enabling Territory Assignment for Prospect

Setting the Default Contact Type: Worked Example

This topic describes how to disable the contact type Contact and set the default contact type to Prospect. The Contact contact type is a B2B concept, and is not used in B2C. In the following procedure, you'll hide some fields, and expose other fields that are more appropriate when selling to individuals instead of companies.

Disabling the Contact Type Contact and Setting the Default Contact Type to Prospect

1. Navigate to Setup and Maintenance.
2. In the Search Tasks field, enter Manage Standard Lookups and click Search.

3. Click the Manage Standard Lookups item.

4. Enter ZCA_CONTACT_TYPE in the Lookup Type field and click Search.

5. Deselect the Enabled check box for Contact.

6. Click Save and Close.
7. In the Search Task box, enter Manage Administrator Profile Values and click Search.

![Search Task Box](image1.png)

8. Click the Manage Administrator Profile Values item.

![Search Task Box](image2.png)

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Administrator Profile Values</td>
<td>Task</td>
</tr>
</tbody>
</table>

9. In the Profile Option Code field, enter `ZCA_DEFAULT_CONTACT_TYPE` and click Search.

![Profile Option Code](image3.png)

10. In the Profile Value drop-down list, select Prospect.

![Profile Value](image4.png)

11. Click Save and Close.

Customizing the Contact Create and Edit Pages: Worked Example

This topic describes how to customize the Create and Edit pages for the Contact object, to prepare it for use with B2C.
Customizing the Create Pages

To customize the Create pages:

1. Navigate to Application Composer, select the **Common** application, and expand **Standard Objects**.
2. Expand **Contact**.
3. Click **Pages** on the Simplified Pages tab.
4. Edit the **Create Contact** layout.

5. Click **Edit** next to **Create Contact**.
6. Hide the **Type** field by moving it from the **Selected Fields** list to the **Available Fields** list.

7. Display the **Job Title** and **Work Phone** fields by moving them from the **Selected Fields** list to the **Available Fields** list.

8. Hide the **Household**, **Gender**, and **Home Phone** fields by moving them from the **Available Fields** list to the **Selected Fields** list.

9. Click **Save and Close**.

10. Click **Done**.

---

### Customizing the Edit Pages

To customize the Edit pages:

1. Edit the **Edit Contact** layout.
2. Edit the contact Overview Form.
3. Hide the **Type**, **Household**, **Gender**, and **Home Phone** fields by moving them from the **Available Fields** list and to the **Selected Fields** list.

4. Display the **Influence Level** and **Buying Role** fields by moving them from the **Selected Fields** list to the **Available Fields** list.

5. Click **Save and Close**.

6. Click **Done**.

### Hiding My Business Contacts from List Management: Worked Example

This topic describes how to hide the “My Business Contacts” saved search list from List Management. The “My Business Contacts” saved search applies only to contacts at companies. When selling to individuals, business contacts don’t apply so you can hide this saved search from your users.

### Hiding the My Business Contacts Saved Search from List Management

To hide the My Business Contacts saved search:

1. Navigate to Contacts.
2. Select **My Business Contacts** from the **List** drop-down list if it isn’t already selected.
3. Click the drop-down list icon again and select **Create or Edit Lists**.
4. In the **Saved Search** drop-down list, select **Personalize**.

5. On the **Personalize Saved Searches** dialog box, deselect the **Show in Search List** check box.

> **Note:** If **My Business Contacts** has been set as the default search, you must select another list as the default search before you can hide it.
6. Click OK.

Enabling Territory Assignment for Prospect: Worked Example

This topic describes how to enable territory assignment for the "Prospect" contact type. Enabling territory assignment for prospects is useful when you want to enable specific territories for specific sales representatives (for example, if you've divided your sales territories by geographic area). Because some companies do not assign sales representatives to specific territories, this process is optional.

Enabling Territory Assignment for Contact Type "Prospect"

1. Navigate to Setup and Maintenance.
2. In the Search Tasks field, enter Manage Standard Lookups and click Search.
3. Click the Manage Standard Lookups item.

4. In the Lookup Type field, enter ORA_HZ% and click Search.

5. In the search results, click the row for Contact Search Record Set Filter.

6. Deselect the Enabled check boxes for the Records in accounts that I own and Records in accounts where I am on the account rows.

7. Click Save and Close.
8. In the **Search Tasks** box, enter **Manage Administrator Profile Values** and click **Search**.

![Search](image)

9. Click the Manage Administrator Profile Values item.

![Search](image)

10. In the **Profile Option Code** field, enter **ZCA_ASSIGNMENT_ACCT%** and click **Search**.

![Profile Option Code](image)

11. Click **New** to add a new profile value.

![New Profile Value](image)

12. Select a **Profile Level** of **Site**, and enter **ZCA_PROSPECT** for the **Profile Value**. Adding this value enables territory assignment for prospects.

![Profile Value](image)

13. Click **Save and Close**.
4 B2C Setup for Opportunities

Customizing the Opportunity Pages for B2C: Overview

This chapter describes how to customize the Opportunity pages for B2C. It contains the following topics:

- Renaming Account to Customer
- Hiding the Primary Contact
- Hiding the Contacts Subtab
- Hiding and Exposing Content in the Opportunity Pages
- Hiding and Enabling Lookup Types

Renaming Account to Customer: Worked Example

This topic describes how to rename the Account field to Customer. You'll need to do this when customizing the Opportunity pages for B2C. In a B2C sales environment, your users sell to people, not to companies. This means that your users will want to record opportunities against customers, not accounts.

Renaming Account to Customer

To perform this customization, you'll use the User Interface Text tool.

1. Navigate to **Tools, User Interface Text**.
2. Click **Search and Replace**.

![Search and Replace](image)

**Customize User Interface Text**

**Customize Application Text**

Search the application for words and phrases you want to change.

**Search and Replace**

**Text Replacement History**

No saved text replacements exist.

3. Enter the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search For - Singular</td>
<td>^Account$</td>
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<tr>
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</tr>
<tr>
<td>Search For - Plural</td>
<td>^Accounts$</td>
</tr>
<tr>
<td>Replace With - Plural</td>
<td>Customers</td>
</tr>
<tr>
<td>Match Case</td>
<td>Selected</td>
</tr>
<tr>
<td>Include in Search</td>
<td>Select the <strong>User Interface Text</strong> and <strong>Global Menu Label Text</strong> check boxes only.</td>
</tr>
</tbody>
</table>
4. Click **Preview Changes**.

After a while (it might take several minutes) a list of preview results appears.
5. Examine the list of results. Hovering your mouse over the **Description** text displays the entire description for each item.

6. Click **Save and Close**.

The number of items that were updated is shown.
7. Test your updates by examining the Opportunity component to ensure that all instances of Account have been replaced by Customer.

Hiding the Primary Contact: Worked Example

This topic describes how to hide the Primary Contact field on the Opportunity Create and Edit pages using Application Composer. You hide the Primary Contact field because in a B2B scenario, you sell to multiple contacts, while in B2C, you sell to a single contact (and thus the concept of a “primary contact” doesn’t apply). You’ll need to do this when customizing the Opportunity pages for B2C.

⚠️ Note: If Households are enabled, do not perform this step.

Hiding the Primary Contact

1. Navigate to Application Composer, select the Sales application, and expand Standard Objects.
2. Expand Opportunity.
3. Click Pages.
4. Under Creation Page Layouts, select the default layout to edit.
5. Click the Edit icon in the **Create Opportunity** region.

6. Hide the Primary Contact by moving it from the **Selected Fields** list to the **Available Fields** list.

7. Click **Save and Close**.
8. Click **Done**.
9. Under Details Page Layouts, click Default Layout, then click Edit.

10. Edit the Summary section.
11. Hide the Primary Contact by moving it from the Selected Fields list to the Available Fields list.

12. Click Save and Close.

Hiding the Contacts Subtab: Worked Example

This topic describes how to hide the Contacts subtab when customizing the Opportunity pages for B2C. Contacts are applicable only when selling to businesses.

Hiding the Contacts Subtab

1. Navigate to Application Composer, select the Sales application, and expand Standard Objects.
2. Expand Opportunity.
3. Click Pages.
4. Select the default Details Page layout and click Edit.
5. Click the arrows icon in the upper left corner of the page.
6. Hide the Contacts subtab by selecting Contacts in the **Selected Subtabs** list, and moving it to the **Available Subtabs** list.

![Configure Subtabs screenshot]

7. Click **OK**.

8. Click **Done**.

---

**Hiding and Exposing Content in the Opportunity Pages: Worked Example**

This topic describes how to use Page Composer to hide the Create Account action and expose the Create Contact and Create Household actions in the Account Search and Select window (also called the Account Picker) on the Opportunity Create and Edit Pages. Accounts are applicable only when selling to B2B customers.
Hiding and Exposing Content in the Opportunity Pages

1. Click **Sales** on the main page.

2. Click **Opportunities**.

3. In the upper right corner of the page, click your name.
4. Select **Customize Pages**.

5. Select **Site** and click **OK**.

6. You should be in Add Content mode. If you aren’t, click **Add Content**.

7. Click **Create Opportunity**.

8. Enter a name for the opportunity.
9. Click the arrow next to the **Customer** field and click **Search**.

10. On the Select: Customer page, click **Select**.

11. Click in the white space directly to the left of the **Create Account** button.

    **Note:** Do not click the actual button.

12. Click **Edit Component**.
13. Click the **Children** tab.

14. Deselect the **Create Account** check box, and select the **Create Contact** and **Create Household** check boxes.

15. Click **OK**.
Notice that the **Create Account** button is hidden, and the **Create Contact** and **Create Household** buttons are displayed.

16. Click **Close** to exit Page Composer.
17. View the Create Opportunity and Edit Opportunity pages to verify that the change was made.

### Hiding and Enabling Lookup Types: Worked Example

This topic describes how to hide the Account record type and enable the Household record type when customizing the Opportunity pages for B2C.

#### Hiding and Enabling Record Types

In these steps, you'll hide the Account record type and enable the Household record type.

1. Navigate to **Setup and Maintenance**.
2. Under Search: Tasks, enter **Manage Standard Lookups** and click the search button.

3. Click **Manage Standard Lookups**.
4. Under **Lookup Type**, enter `ZCA_RECORD_TYPE`.

5. Click **Search**.

6. Under the Lookup Codes list, deselect the **Enabled** check box for the Account item under **Meaning**, and select the **Enable** check box for the Household item.
5 B2C Setup for Activities

Customizing the Activity Pages for B2C: Overview

This chapter describes how to customize the Activity pages for B2C. It includes the following topics:

- Renaming Account to Customer
- Hiding the Primary Contact for Activity
- Hiding the Contacts Subtab in Activity
- Hiding the Record Type Lookup Value for Activity

Renaming Account to Customer in Activity: Worked Example

This topic describes how to rename Account to Customer throughout the user interface. In B2C, you sell to customers, not to accounts. To make this customization, you’ll use the User Interface Text tool.

⚠️ Note: If you’ve already performed these steps for Opportunity, you don’t need to do it again for Activity.

Renaming Account to Customer

1. Navigate to Tools, User Interface Text.
2. Click **Search and Replace**.

**Customize User Interface Text**

**Customize Application Text**

Search the application for words and phrases you want to change.

[Search and Replace]

**Text Replacement History**

No saved text replacements exist.

3. Enter the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Enter</th>
</tr>
</thead>
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<td>Search For - Singular</td>
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</tr>
<tr>
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</tr>
<tr>
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<td>^Accounts$</td>
</tr>
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<td>Replace With - Plural</td>
<td>Customers</td>
</tr>
<tr>
<td>Match Case</td>
<td>Selected</td>
</tr>
<tr>
<td>Include in Search</td>
<td>Select the User Interface Text and Global Menu Label Text check boxes only.</td>
</tr>
</tbody>
</table>
4. Click **Preview Changes**.

   After a while (it might take several minutes), a list of preview results appears.

5. Examine the list of results. Hovering your mouse over the Description text displays the entire description for each item.

6. Click **Save and Close**.

   The number of items that were updated is shown.

7. Test your updates by examining the Activity components to ensure that all instances of Account have been replaced by Customer.
Hiding the Primary Contact for Activity: Worked Example

This topic describes how to hide Primary Contact on the Call Report and Task Create and Edit pages using Application Composer. You hide the Primary Contact field because in a B2B scenario, you sell to multiple contacts, while in B2C, you sell to a single contact (and thus the concept of a “primary contact” doesn’t apply).

*Note:* You only need to perform this step if Household is not used.

Hiding the Primary Contact

1. Navigate to Application Composer, select the *Sales* application, and expand *Standard Objects*.
2. Expand *Activity*.
3. Verify that you’re on the Simplified Pages tab, then click *Pages*.
4. Select *Default Layout* under Call Report Create and edit the Creation Page Layout.

![Activity: Pages]

```
<table>
<thead>
<tr>
<th>Activity: Pages</th>
</tr>
</thead>
<tbody>
<tr>
<td>SimulPage</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Leading Page</td>
</tr>
<tr>
<td>Creation Page Layouts</td>
</tr>
<tr>
<td>Activity View</td>
</tr>
<tr>
<td>Default Layout</td>
</tr>
</tbody>
</table>
```
5. Edit Call Report Create.

6. Display the Primary Contact field by moving it from the **Selected Fields** list to the **Available Fields** list.

7. Click **Save and Close**.

8. Click **Done**.
9. Under Details Page Layouts, click **Default Layout** for Call Report, then click **Edit**.

10. Edit the Summary section.
11. Display the Primary Contact field by moving it from the **Selected Fields** list to the **Available Fields** list.

12. Click **Save and Close**.

13. Repeat steps 5 through 13 for Task.

**Hiding the Contacts Subtab in Activity: Worked Example**

This topic describes how to hide the Contacts subtab for the Call Report, Appointment, and Task components of the Activity object. Contacts are used only when selling to businesses, so the Contacts subtab is not used for B2C.

**Hiding the Contacts Subtab**

1. Navigate to **Application Composer**, select the **Sales** application, and expand **Standard Objects**.
2. Expand **Activity**.
3. Click **Pages**.
4. Select the default Details Page layout and click **Edit**.
5. Click the arrows icon in the upper left corner of the page.
6. Hide the Contacts subtab by selecting Contacts in the **Selected Subtabs** list and moving it to the **Available Subtabs** list.

7. Click **OK**.

8. Click **Done**.

9. Repeat steps 1 through 5 for Task and for Appointment.

Hiding the Record Type Lookup Value for Activity: Worked Example

This section describes how to hide the Record Type lookup value for the Activity component. This value is only relevant to B2B.

Hiding the Record Type Lookup Value

1. Navigate to Setup and Maintenance.
2. Under Search: Tasks, enter **Manage Standard Lookups** and click the search button.
3. Click **Manage Standard Lookups**.

4. Under **Lookup Type**, enter `ZCA_RECORD_TYPE`.

5. Click Search.

6. Under the **Lookup Codes** list, deselect the **Enabled** check box for the Account item under Meaning, and select the **Enabled** check box for the Household item.
6 B2C Setup for Leads

Customizing the Lead Pages for B2C: Overview

B2C transactions are sold to individuals directly, rather than to customer accounts. You must perform some setup tasks to allow users to create leads for single contacts rather than for accounts.

This chapter describes how to customize the Lead pages for B2C. It includes the following topics:

- Hiding the Account Field for Lead
- Relabeling the Primary Contact Field to Contact
- Hiding the Contacts Subtab From the Lead Edit Page
- Updating the Copy Map to Copy the Lead Contact Value
- Writing a Groovy Script to Change the Contact Type

Hiding the Account Field for Lead: Worked Example

This topic describes how to hide the Account field from the List, Create, and Edit pages for the Lead object. This field is not relevant to B2C, since you will not be selling to accounts.

Hiding the Account Field from the Lead List, Create, and Edit Pages

1. Navigate to Application Composer, select the Sales application, and expand Standard Objects.
2. Expand Sales Lead.
3. Click Pages.
4. On the Simplified Pages tab, select Default Layout on the Creation Pages layout and edit it.
5. Hide the Account field by moving it to the Available Fields list.

6. Click Save and Close.
7. Click Done.
8. In the Landing Page region, click Edit Summary Table.

9. Display the Account field by moving it to the Selected Fields list.
10. Click Save and Close.
11. Click Done.
12. In the Details Page Layout region, select the default layout and edit it.
13. Hide the Account field by moving it to the Available Fields list.

14. Click Save and Close.

15. Click Done.

Relabeling the Primary Contact Field to Contact: Worked Example

This topic describes how to relabel the Primary Contact field to Contact when customizing the Lead object for B2C. You rename the Primary Contact field because in a B2B scenario, you sell to multiple contacts, while in B2C, you sell to a single contact (and thus the concept of a "primary contact" doesn’t apply).
Relabeling the Primary Contact Field to Contact

To make this customization, you'll use the User Interface Text tool.

1. Navigate to Tools, User Interface Text.

2. Click **Search and Replace**.

Customize User Interface Text
Customize Application Text

Search the application for words and phrases you want to change.

**Search and Replace**

Text Replacement History
No saved text replacements exist.

3. Enter the following information:

<table>
<thead>
<tr>
<th>Field Name</th>
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<tbody>
<tr>
<td>Search For - Singular</td>
<td>^Primary contact$</td>
</tr>
<tr>
<td>Replace With - Singular</td>
<td>Contact</td>
</tr>
<tr>
<td>Search For - Plural</td>
<td>^Primary Contacts$</td>
</tr>
</tbody>
</table>
4. Click Preview Changes.
After a while (it might take several minutes) a list of preview results appears.

5. Examine the list of results. Hovering your mouse over the Description text displays the entire description for each item.

6. Click Save and Close.

The number of updated items is shown.
7. Test your updates by examining the Sales Lead component to ensure that all instances of Primary Contact have been replaced by Contact.

Hiding the Contacts Subtab from the Lead Edit Page: Worked Example

This topic describes how to hide the Contacts subtab from the Edit page for the Lead object. The Contacts subtab is not relevant to B2C.

Hiding the Contacts Subtab from the Lead Edit Page

1. Navigate to Application Composer, select the Sales application, and expand Standard Objects.
2. Expand Sales Lead.
3. Click Pages.
4. In the Details Page Layouts region, select the default layout and edit it.

5. Click the arrows icon at the top left corner of the page under **Subtabs Region**.
6. Hide the Contacts subtab by selecting it under **Selected Subtabs** and moving it to **Available Subtabs**.
7. Click **OK**.
8. Click **Done**.

**Updating the Copy Map to Copy the Lead Contact Value: Worked Example**

This topic describes how to update the copy map to copy over the Lead contact value into the opportunity’s Customer field.
Updating the Copy Map to Copy the Lead Contact Value

In this step, you'll update the copy map to copy over the Lead contact value into the opportunity Customer field. Copy maps are a declarative way to specify what fields are copied among objects. The functionality for converting a lead to an opportunity uses the predefined Copy Lead To Opportunity Map copy map feature.

1. At the bottom left of the Application Composer pane, click **Copy Maps** under Advanced Setup.
2. Click **Copy Lead to Opportunity Map**.

![Copy Maps table]

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copy Lead To Opportunity Map</td>
<td>Default mapping file for creating an opportunity from a lead.</td>
</tr>
<tr>
<td>Copy Response To Lead Map</td>
<td>Default mapping file for creating a Lead from a Response.</td>
</tr>
<tr>
<td>Copy Response To Opportunity Map</td>
<td>Default mapping file for creating an Opportunity from a Response.</td>
</tr>
<tr>
<td>Copy Deal Registration To Opportunity Map</td>
<td>Default mapping file for creating an opportunity from a deal.</td>
</tr>
</tbody>
</table>

3. Under the **Attribute Mappings** section, in the row for TargetPartyId, select PrimaryContactId from the drop-down list in the From column.

![Attribute Mappings table]

<table>
<thead>
<tr>
<th>To</th>
<th>Referenced View Object</th>
<th>Primary Key</th>
<th>From</th>
<th>From Expression</th>
</tr>
</thead>
<tbody>
<tr>
<td>BudgetAmount</td>
<td></td>
<td></td>
<td>null</td>
<td>$0 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>BudgetizedFlag</td>
<td></td>
<td></td>
<td>null</td>
<td>$2 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>CurrencyCode</td>
<td></td>
<td></td>
<td>null</td>
<td>$3 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>Description</td>
<td></td>
<td></td>
<td>null</td>
<td>$4 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>Email</td>
<td></td>
<td></td>
<td>null</td>
<td>$5 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>KeyContact</td>
<td></td>
<td></td>
<td>null</td>
<td>$6 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>Name</td>
<td></td>
<td></td>
<td>null</td>
<td>$7 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>Owner</td>
<td></td>
<td></td>
<td>null</td>
<td>$8 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>PrimaryContactAddress1</td>
<td></td>
<td></td>
<td>null</td>
<td>$9 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>PrimaryContactCity</td>
<td></td>
<td></td>
<td>null</td>
<td>$10 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>PrimaryContactCountry1</td>
<td></td>
<td></td>
<td>null</td>
<td>$11 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>PrimaryContactCountry2</td>
<td></td>
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<td>null</td>
<td>$12 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>PrimaryContactCount</td>
<td></td>
<td></td>
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<td>$13 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>PrimaryContactEmail</td>
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<td></td>
<td>null</td>
<td>$14 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>PrimaryContactPhone</td>
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<td></td>
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<td>$15 = &quot;APPROVED &quot;?Y</td>
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<tr>
<td>PrimaryContactTitle</td>
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<td></td>
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<td>$16 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>PrimaryContactType</td>
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<td>$17 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>PrimaryContactUnique</td>
<td></td>
<td></td>
<td>null</td>
<td>$18 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>PrimaryOrganizationId</td>
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<td>$19 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>PrimaryOrganizationName</td>
<td></td>
<td></td>
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<td>$20 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>PrimaryOrganizationType</td>
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<td>$21 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>RelatedResourceId</td>
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<td></td>
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<td>$22 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>RequiredDate</td>
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<td>$23 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>sellerId</td>
<td></td>
<td></td>
<td>null</td>
<td>$24 = &quot;APPROVED &quot;?Y</td>
</tr>
<tr>
<td>TargetPartyId</td>
<td></td>
<td></td>
<td>null</td>
<td>$25 = &quot;APPROVED &quot;?Y</td>
</tr>
</tbody>
</table>

4. Click **Save and Close**.

**Related Topics**
- Modifying the Lead to Opportunity Copy Map: Worked Example

### Writing a Groovy Script to Change the Contact Type: Worked Example

This topic describes how to write a Groovy script to change the contact type to SALES_PROSPECT when updating the Lead object for B2C. This process is optional: you only need to do it if you want to change the Contact Type label to SALES_PROSPECT.
Writing a Groovy Script to Change the Contact Type

To write Groovy script to change the contact type to SALES_PROSPECT:

1. Navigate to Tools, Application Composer, and expand Standard Objects.
2. Expand Contacts.
3. Click **Server Scripts**.
4. Click the **Triggers** tab.
5. Click **Create**.
6. Give the trigger a descriptive name (for example, "ChangeContactType").
7. Enter the following into the trigger definition field:

   ```groovy
   if (CreatedByModule == 'FUSION_MKT') {
       def personParty = PersonParty
       if (personParty != null) {
           def usageCode = personParty.getAttribute("PartyUsageCode")
           if (usageCode == 'CONTACT') {
               personParty.setAttribute("PartyUsageCode", "SALES_PROSPECT")
           }
       }
   }
   ```

8. Click **Validate**.
9. Click **Save and Close**.
7 B2C Setup for the Springboard

Customizing the Springboard for B2C: Overview

You’ll want to customize the Springboard so it makes sense for your users in a B2C sales environment. This chapter describes how to add your features to the Oracle Sales Cloud Springboard.

It includes the following topics:

- Hiding Accounts from the Springboard
- Showing Households on the Springboard

Hiding Accounts From the Springboard: Worked Example

This topic describes how to hide the Accounts item so it’s not visible from the Springboard.

Hiding Accounts from the Springboard

1. Navigate to Application Composer, Tools, Structure.

2. Expand Sales.
3. Click **Accounts**.

4. Select **No** in the **Show on Welcome Springboard** drop-down list.

5. Click **Save and Close**.

**Showing Households on the Springboard: Worked Example**

This topic describes how to show the Household item so it’s visible from the Springboard. For more information about households, refer to your household documentation.
Showing Households on the Springboard

1. Navigate to Application Composer, Tools, Structure.

2. Expand Sales.

3. Click Households.
4. Select Yes in the **Show on Welcome Springboard** drop-down list.

5. Click **Save and Close**.