# Oracle Sales Cloud
## Getting Started with Your Implementation

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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 customers who are implementing Oracle Sales Cloud for the first time with the concepts and procedures they need to implement a sales automation solution in an Oracle Sales Cloud, Release 12, test environment. This guide explains how to implement a simple and common use case for a business that sells to other businesses. It does not explain all the different options for the default settings provided by Oracle. Nor does it provide explanations of all available features.

Note:
- If you are implementing Oracle Partner Relationship Management, then refer to the Getting Started with Oracle Partner Relationship Management guide instead of this guide.
- If you are setting up Oracle Sales Cloud together with another cloud service such as Oracle Global Human Resources Cloud, Oracle Procurement Cloud, and Oracle Financials Cloud, then you must implement those cloud services first according to their respective implementation guides. You must then follow a different set of steps for your initial Oracle Sales Cloud setup.

How to Use This Guide

The chapters in this guide cover the setup in the recommended order. Each chapter assumes that you have completed the steps in the previous chapters. Here’s how to use this guide:

- Use the Setup Overview in each chapter as a guide to the setups you must perform. Many chapters provide brief conceptual overviews of the functionality you are setting up. The remaining topics in the chapter provide the step-by-step details of how to perform each of those setups.
- You can navigate to most of the setup tasks from an implementation project provided by Oracle that you can download from My Oracle Support.
- Refer to other guides for full explanation of the different features and options.
- Use the Setup Task Overview chapter to get an overview of the tasks covered in this guide.

What Your Sales Organization Can Do After Setup

After you complete the setups in this guide, your sales organization can:

- Manage account and contact information:
  - Track your team’s interactions with account contacts.
  - Schedule meetings, calls, and demonstrations for the whole team.

- Share and collaborate on sales documents:
  - Share documents, images, and other rich media between people and groups.
• Make it possible for everyone to annotate and discuss each document.

• Work in Google Gmail and Calendar that’s integrated with Oracle Sales Cloud:
  • Know if a sender or addressee in an e-mail you receive is already a contact in Oracle Sales Cloud or create new contacts.
  • Share appointments and the text of important e-mails on accounts, opportunities, contacts, and leads in Oracle Sales Cloud so that the whole organization knows how you are engaging with the customer.
  • Keep important contacts and appointments synchronized between Google Contacts and Oracle Sales Cloud

• Manage opportunities:
  • Automatically assign the right salespeople to each opportunity.
  • Have your sales team manage the opportunity life cycle using a standard sales process.
  • Leverage the experience of your entire organization to help teams sell through social interactions.

• Manage the sales team:
  • Assign tasks and deadlines to ensure the work is done.
  • Provide management with reports on your team’s activities.

• Forecast your revenue:
  • Your salespeople submit their forecasts that are based on criteria you choose.
  • Managers can adjust the forecasts, if necessary.

• Keep contacts informed using sales campaigns:
  • Salespeople can create e-mail campaigns to keep their contacts informed of new product launches, discounts, and events.
  • The sales campaigns automatically track responses and can generate follow-up activities.

• Import and qualify leads
  • The sales organization can follow a standard process for qualifying leads
  • You can easily set up an inside sales group to verify the information in leads before passing them on to field sales for follow-up and conversion to opportunities.

• Work on multiple devices:
  • Manage all your customer-facing information, forecasts, and other activities on mobile devices and in Microsoft Outlook.

  Setting up Outlook and mobile devices is optional. If you want, you can leave this setup for later.

• Automatically create product recommendations and leads for individual accounts based on rules that you set up in Sales Predictor. For example, if the government provides tax incentives to introduce green products into schools, then you can automatically alert your sales organization to recommend your green products to education accounts.
Prerequisites

This guide assumes that you have subscribed to Oracle Sales Cloud and have received the e-mail with your environment and initial sign-on information.

Case Study

This guide employs a case study to help define the scope of the implementation considerations and tasks. The case study is based on a fictitious company named Vision Corp, a global high-tech company which sells multiple server product lines to businesses and other organizations. The company is introducing a product line of green servers that are energy efficient, eco-friendly, and will further help it to remain competitive in the server market.
The following figure shows the portion of the organization chart of Vision Corp that the company has decided to use for the pilot implementation.

**Field Sales**

- William Taylor
  - CEO
  - Vision Corp.

- Peter Apt
  - Vice President
  - Global: High Tech

- Bob Boyle
  - Sales Vice President
  - US Direct Sales

**Inside Sales**

- Martin Conway
  - Sales Vice President
  - US Product Sales

- John Dunbar
  - Sales Administrator
  - US Product Sales

- Alex Smith
  - Sales Manager
  - US Products - Central

- Peter Branch
  - Salesperson
  - US Products - Central

- Marilyn Richie
  - Salesperson
  - US Products - Central

- Mateo Lopez
  - Sales Manager
  - US Products - West

- Michael Rhodes
  - Sales Manager
  - US Products - East

- Lisa Jones
  - Salesperson
  - US Products - West

- Julian Henderson
  - Salesperson
  - US Products - West

- Kristen Garrity
  - Salesperson
  - US Products - East

- Sean Goodkin
  - Salesperson
  - US Products - East

**The US Direct Sales division of Vision Corp:**

- Sells to businesses and must know everything about the key contacts at the customers it sells to.
- Operates within one country (US) and has three field sales regions: West, Central, and East.
- Includes a team of inside sales representatives who are tasked with verifying and qualifying leads coming from outside sources such as trade shows and web visits. After they qualify the leads, the inside sales representatives pass them on to the field sales organization for follow-up.
- Is setting up sales automation initially without any integrations with other Oracle Cloud offerings.
- Organizes its field sales territories by state and product.
Related Guides

You can refer to the following guides as you implement, administer, and use Oracle Sales Cloud.

Implementation Guides
The following table lists related guides used during implementation.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Getting Started with Oracle Partner</td>
<td>Provides implementation users and channel sales users with the concepts and</td>
</tr>
<tr>
<td>Relationship Management</td>
<td>procedures necessary to configure Oracle Sales Cloud for channel sales.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing</td>
<td>Contains information to help implementors define the setup for managing</td>
</tr>
<tr>
<td>Customer Data Management</td>
<td>customer information and the configuration for customer hub deployment.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing</td>
<td>Contains conceptual information and procedures needed to implement the</td>
</tr>
<tr>
<td>Enterprise Contracts</td>
<td>contract management features of Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing</td>
<td>Contains information about implementing sales compensation and payment plans.</td>
</tr>
<tr>
<td>Incentive Compensation</td>
<td></td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing</td>
<td>Contains conceptual information and procedures needed to implement the</td>
</tr>
<tr>
<td>Marketing</td>
<td>marketing components and features of Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Sales</td>
<td>Contains conceptual information and procedures needed to implement</td>
</tr>
<tr>
<td></td>
<td>components and features of Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Engagement Cloud Implementing</td>
<td>Contains conceptual information and procedures needed to implement the</td>
</tr>
<tr>
<td>Service Request Management</td>
<td>service request components and features of Oracle Engagement Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Understanding</td>
<td>Contains information to help those charged with exporting and importing</td>
</tr>
<tr>
<td>File-Based Data Import and Export</td>
<td>object data.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Securing Oracle Sales</td>
<td>Contains information to help setup users and sales administrators configure</td>
</tr>
<tr>
<td>Cloud</td>
<td>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>

User Guides
The following table lists Oracle Sales Cloud user guides.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud Using Campaigns</td>
<td>Contains information about creating and managing sales campaigns.</td>
</tr>
</tbody>
</table>
### Oracle Sales Cloud Using Customer

**Oracle Contracts**
Contains information about creating and managing customer contracts.

**Oracle Sales Cloud Using Customer Data Management**
Contains information about managing customer information and customer data quality.

**Oracle Sales Cloud Using Incentive Compensation**
Contains information about administering and maintaining sales compensation and payment plans.

**Oracle Sales Cloud Using Leads**
Contains information about creating and managing leads.

**Oracle Sales Cloud Using Sales**
Contains information about performing day-to-day tasks in Oracle Sales Cloud.

**Oracle Engagement Cloud Using Service Request Management**
Contains information about creating service requests and managing service request queues.

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### Analytics Guides

The following table lists Oracle Sales Cloud analytics and reports guides.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud Creating and Administering Analytics</td>
<td>Contains information about reports and analytics provided by Oracle and explains how to create your own reports, analytics, and dashboards.</td>
</tr>
</tbody>
</table>

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### Configuration Guides

The following table lists Sales Cloud configuration guides and one common cloud configuration guide.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud Getting Started with Extending Sales</td>
<td>Introduces you to user interface elements, user interface types, and simple, common configurations of the applications.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Extending Sales</td>
<td>Describes how to create and modify objects and to configure 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 you to use the Groovy scripting language to enhance Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Applications Cloud Configuring and Extending Applications</td>
<td>Describes the tools and concepts for configuring applications.</td>
</tr>
</tbody>
</table>
Common Applications Guides
The following table lists Oracle cloud guides for common features.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Applications Cloud Using Functional Setup Manager</td>
<td>Describes how to use Oracle Functional Setup Manager (also known as the Setup and Maintenance work area) to implement the applications.</td>
</tr>
<tr>
<td>Oracle Applications Cloud Understanding Enterprise Structures</td>
<td>Explains how to use the Oracle Fusion Applications enterprise structures to meet your company’s legal and management objectives.</td>
</tr>
<tr>
<td>Oracle Applications Cloud Using Common Features</td>
<td>Provides an overview of the application functionality that is common across the applications.</td>
</tr>
<tr>
<td>Oracle Cloud Using Oracle Social Network</td>
<td>Describes implementation and user concepts for Oracle Social Network.</td>
</tr>
</tbody>
</table>

Related Topics
• Oracle Help Center
2 Signing In and Getting Ready

Preliminary Tasks Setup Overview

Before you start implementing your sales application according to the instructions in this guide, you must complete the preliminary tasks listed in the following table.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Before you sign in for the first time, complete the actions listed in the Service Administrator Action List provided by Oracle. You must create your account with support.oracle.com.</td>
<td>See the Signing In for the First Time topic in this chapter.</td>
</tr>
<tr>
<td>2</td>
<td>Enable the Sales offering for implementation.</td>
<td>See the Enabling the Sales Offering for Implementation topic in this chapter.</td>
</tr>
<tr>
<td>3</td>
<td>Install into your environment an implementation project that speeds up access to the implementation tasks. You can download the implementation project from support.oracle.com and upload it into your environment.</td>
<td>See Enabling Quick Access to Setup tasks topic in this chapter.</td>
</tr>
</tbody>
</table>

Useful Toolbar Icons

The following figure explains the most useful toolbar icons.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Opens the Navigator.</td>
</tr>
<tr>
<td>2</td>
<td>Returns you to the springboard.</td>
</tr>
<tr>
<td>3</td>
<td>Marks a page as favorite and provides access to recently viewed pages.</td>
</tr>
<tr>
<td>4</td>
<td>Turns on contextual help.</td>
</tr>
<tr>
<td>5</td>
<td>Opens the Settings and Actions menu. From the menu, you can sign out, personalize and customize the UI, access help, and navigate to the Setup and Maintenance work area.</td>
</tr>
</tbody>
</table>
About Accessing Setup Tasks

You perform setup tasks in the Setup and Maintenance work area and in other work areas of the application.

Speeding Up Access to Setup Tasks Using the Implementation Project

You gain faster access to the setup tasks covered in the Getting Started with Your Oracle Sales Cloud Implementation guide by downloading and installing an implementation project provided by Oracle. The implementation project complements the structure of this guide and provides a direct link to each core setup task.

If you do not use the implementation project, then you must navigate to each individual task separately. Depending on the task, you must either search for the task by name in the Setup and Maintenance work area or navigate to a different work area using the Navigator.

Searching for Setup Tasks in the Setup and Maintenance Work Area

You can also search for individual tasks by name in the Setup and Maintenance work area. Use the percent sign (%) to represent missing letters or words. For example, to find the Manage HCM Role Provisioning Rules task, you can search for manage hcm%rules. The searches aren’t case-sensitive.

Navigating to Other Work Areas for Setup

When you are not using the implementation project, you can use the Navigator to access other work areas involved in setup. You can open the Navigator by clicking its icon in the toolbar.

The Navigator, shown in the following figure, lists all of the application work areas that are available based on the permissions assigned to each user, rather than on the features you have purchased. Because a setup user has a broad range of permissions, not all of the selections are applicable to your setup. Aside from the Setup and Maintenance work area, you use only a small number of the available work areas accessible from the Navigator menu. The most important of these include:

- **My Team**
  - **Manage Users**

  Use this work area for creating and managing individual users in the UI. The Manage Users task in the Setup and Maintenance work area opens the same work area.
Chapter 2
Signing In and Getting Ready

• Tools
  ○ Scheduled Processes
    Use this work area for scheduling and monitoring background processes. The Scheduled Processes work area is not available when you first sign in as the initial user. You must grant yourself the additional privileges as described in this guide.
  ○ Application Composer
    Use Application Composer to customize and extend your application.

• Sales
  Use the different work areas under this heading for functional setup and to create data used to test your sales application.

Navigator

Signing In for the First Time

When your environment is ready, Oracle sends an e-mail to the person designated as the administrator when you signed up with Oracle Sales Cloud. This e-mail includes the link to your service, a temporary password, and instructions on how to access the Service Administrator Action List. You must follow the instructions in the actions list before signing in.
Enabling the Sales Offering for Implementation

Before you start work, you must enable the functional areas of the Sales Cloud you are going to be using for implementation. Enabling the different areas makes it possible for you to track the progress of your implementation from within the Setup and Maintenance work area. You can enable only the functional areas you are implementing now and add more later, if required.

To enable the functional areas:

1. Navigate to the Setup and Maintenance work area.
2. Click the Sales offering icon (callout 1 in the following figure).
3. Click **Configure** (callout 2).
The Configure: Sales page appears.

![Configure: Sales Page](image)

4. Select the **Enable for Implementation** option, highlighted in the preceding figure, for the functional areas you are setting up. For this guide, select Sales, Quotas, Competitors, Sales Forecasting, and Territory Management, depending on which implementation project version you are using.

5. Click **Actions** and select **Go to Offerings**.

   You are returned back to the Setup and Maintenance page.

### Enabling Quick Access to Setup Tasks

**Video**

Watch: This tutorial shows you how to speed up your initial Oracle Sales Cloud setup using an implementation project supplied by Oracle. The implementation project serves as a launch pad for many of the setup tasks, so you don’t have to search for individual setup tasks or navigate to work areas, including scheduled processes. The content of this video is also covered in text topics.

**Procedures**

**Downloading the Implementation Project to Your Desktop**

Download the implementation project to your desktop from Oracle Sales Cloud: Getting Started with Your Implementation: Implementation Project (Doc ID 2065998.1) available on support.oracle.com.
There are two variations of the implementation project that you can download depending on how much functionality you want to set up:

- **R12 Quick Setup Core Sales**: Use this implementation project for setting up account, contact, and opportunity management only.
- **R12 Quick Setup Sales**: Use this implementation project to set up sales quotas and sales forecasting in addition to the core features.

The Getting Started with Your Oracle Sales Cloud Implementation guide covers the tasks in both variations.

### Installing the Implementation Project You Downloaded

Install the implementation project by uploading the configuration package file using these steps:

1. Navigate to the Setup and Maintenance work area.
2. Click the **Tasks** menu icon highlighted in the following figure.

![Setup and Maintenance](image)

3. Click the **Manage Configuration Packages** link.
4. Click **Upload**.

   The Upload Configuration Package page appears.
5. Click **Choose File** and select the compressed file with the implementation project you downloaded.
6. Click **Get Details**.
7. Click **Submit**.

   The application displays a message that the import is successful and the implementation project was created.
8. Click **OK** to close the message window.
9. Click **Done** on the Manage Configuration Packages page.

   You are returned to the Setup and Maintenance work area page.
10. Click **Implementation Projects**.
The Implementation Projects page appears listing your project.

11. Click the name link to open the implementation project.

Using the Implementation Project As a Launchpad for Your Tasks

Follow these steps to use the implementation project as the launchpad for your implementation tasks.

1. Navigate to the Setup and Maintenance work area by clicking on the icon on the springboard.

   The Setup and Maintenance page appears.

   ... [Image of Setup and Maintenance page]

   2. Click **Implementation Projects**.

   The Implementation Projects page appears listing your project.

   3. Click the name link for the project.
The implementation project displays the folders containing the individual tasks in the Task Lists and Tasks region.

**Implementation Project: Quick Set Up Sales**

**Basic Information**

- **Name**: Quick Set Up Sales
- **Code**: EA1430F0_F6F0_4B73_83D0_97C303
- **Assigned To**: VK

**Task Lists and Tasks**

<table>
<thead>
<tr>
<th>Task</th>
<th>Help</th>
<th>Go to Task</th>
<th>Select Scope</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Review Company Profile</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Setup Users</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage Job</td>
<td></td>
<td>[Go to Task]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage HCM Role Provisioning Rules</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage Users</td>
<td></td>
<td>[Go to Task]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Sales Users</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. Click on a folder to open it and click the **Go to Task** icon for a task. This icon is highlighted in the preceding figure. When you complete a task, you are returned back to the project.

*Note:* Some of the optional tasks covered in the last chapters of this guide, including product recommendations and mobile access, are not accessible from the implementation project. You must access these tasks as indicated in the guide.

**Speeding Up Import Using Excel Macros Provided by Oracle**

The import topics in this guide explain how to import your data using Microsoft Excel macros. These macros, provided by Oracle, are designed to speed up and simplify the import of small data sets of key objects (up to 1000 records for some
objects). The macros help you by validating your data entries, providing lists of values, and automatically populating constant values. After you enter your data, you click a button in the macro to import. The macros automatically create an import activity in Oracle Sales Cloud for you and permit you to monitor the progress of the import activity from within the macro itself. The import macros are targeted to the simple sales automation use case covered in the guide. They can also serve as a learning tool for more complex import.

Macros are available for importing the following objects:

- Sales Users
- Products and product groups
- Accounts
- Contacts
- Account Hierarchy
- Leads
- Opportunities

Oracle also provides the mappings you need to import your data from the macros. When you import, the mappings tell the application which column in your data file maps to which application attribute. The macros either use the existing default mapping in the application or provide a mapping file you must upload into your application before importing.

You can download the Excel macros and the required mapping files from the Getting Started with Your Implementation: Quick Import Macros (Document ID 2229503.1) article on My Oracle Support.

**Note:** You can modify the macros to import additional standard fields and customer-defined fields. If you add additional columns to the macro, then you must also modify the existing import mappings. The steps for modifying the macros and mappings are not covered in this guide.
3 Setup Task Overview

About the Setup Task Overview

Review the setup tasks Oracle completed for you and use the task list as a reference to the setups covered in this guide.

Setup Tasks Completed for You in Oracle Sales Cloud

Oracle sets up the application with some basic information about your company, information that you provided when you signed up for Oracle Sales Cloud. You can verify the values using the tasks provided in this topic. You can reach the tasks directly from the implementation project provided by Oracle, or by searching for the tasks in the Setup and Maintenance work area.

Note: If you are setting up Oracle Sales Cloud together with another cloud service such as Oracle Global Human Resources Cloud, Oracle Procurement Cloud, and Oracle Financials Cloud, then Oracle does not complete any of these tasks in your environment. In such shared Global Single Instance environments, you must set up enterprise structures, such as legal entity and business unit, in the other cloud services according to the instructions provided in their respective implementation guides. All guides are available on docs.oracle.com.

The following table lists and describes the information entered for you.

<table>
<thead>
<tr>
<th>What Oracle Enters for You</th>
<th>Description</th>
<th>Setup Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your company name</td>
<td>Access this task to view the company name Oracle entered based on the information you provided.</td>
<td>Manage Enterprise HCM Information</td>
</tr>
<tr>
<td>Your corporate address and legal entity</td>
<td>The corporate address is the address that you provided. As a best practice, use the same legal corporate address used for tax information. The legal entity name Oracle enters for you is your enterprise name followed by the suffix LE. Because the legal entity is used in setup only and is not visible to Sales Cloud users, the name you use is unimportant. When you create a user who is an employee, you must specify the legal entity. In the Create User UI, the legal entity is called the Legal Employer.</td>
<td>Search Legal Entities</td>
</tr>
<tr>
<td>Creates a business unit and sets the business unit as the default.</td>
<td>Oracle creates one business unit for creating your employee users. The business unit name is your enterprise name followed by the suffix BU. Oracle then sets the profile option HZ_DEFAULT_BU_CRM to that business unit.</td>
<td>Manage Common CRM Business Unit Profile Options</td>
</tr>
</tbody>
</table>
In addition, Oracle creates one user for you. This is the initial user you received in the welcome e-mail. The initial user is provisioned with the following job roles:

- Application Implementation Consultant
- IT Security Manager
- Application Diagnostic Administrator

The initial user can create other users, change security settings, and perform many, but not all, implementation tasks. The user is not provisioned with all the security permissions required to complete the setups in this guide, but has the ability to assign these roles to herself and to others. For example, the initial user does not have the permission to set up search and run and monitor scheduled processes.

Setup Task Summary

The following table summarizes the setups covered by this guide and the setup tasks that you use to carry them out.

You can open most of the setup tasks from a folder in the implementation project you downloaded. For tasks that are not in the project, you must navigate to specific work areas as indicated. Oracle provides Excel macros to speed up the import of users, products, product groups, accounts, contacts, account hierarchies, and opportunities. The macros automatically populate some data for you, help you avoid common mistakes, and make it possible to import without having to manually create an import activity. You can download the macros from My Oracle Support (Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1)).
### Setup Description

<table>
<thead>
<tr>
<th>Task Names</th>
<th>Implementation Project Folder</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Set up the calendar periods you need for your sales forecasts and reports by creating an accounting calendar.</strong></td>
<td>Set Up Accounting Calendar and Currency</td>
</tr>
<tr>
<td>- Manage Accounting Calendars</td>
<td></td>
</tr>
<tr>
<td>- Manage Calendar Profile Option</td>
<td></td>
</tr>
<tr>
<td><strong>Make the periods you created available for business intelligence reports and analytics by running the process Refresh Denormalized Time Dimension Table for BI either from the implementation project or from the Scheduled Processes work area.</strong></td>
<td>Set Up Accounting Calendar and Currency</td>
</tr>
<tr>
<td>Refresh Denormalized Time Dimension Table for BI</td>
<td></td>
</tr>
<tr>
<td><strong>Specify the currency you are using by setting the profile option ZCA_COMMON_CORPORATE_CURRENCY. Oracle Sales Cloud works with only one currency as delivered.</strong></td>
<td>Set Up Accounting Calendar and Currency</td>
</tr>
<tr>
<td>Manage Currency Profile Options</td>
<td></td>
</tr>
<tr>
<td><strong>Import geography reference data for the countries where you do business and set up UI validation for those address elements that are used in sales territories and forecasts.</strong></td>
<td>Set Up Geography Data</td>
</tr>
<tr>
<td>- Manage Geographies</td>
<td></td>
</tr>
<tr>
<td>- Manage Administrator Profile Values</td>
<td></td>
</tr>
<tr>
<td><strong>Enable and configure the two types of search in Oracle Sales Cloud: the global search at the top of each page and the work area searches.</strong></td>
<td>Configure Search</td>
</tr>
<tr>
<td>- Synchronize Database Search Indexes for CRM Objects</td>
<td></td>
</tr>
<tr>
<td>- Optimize Database Search Indexes for CRM Objects</td>
<td></td>
</tr>
<tr>
<td>- Manage Administrator Profile Values</td>
<td></td>
</tr>
<tr>
<td>- Manage Search View Objects</td>
<td></td>
</tr>
<tr>
<td><strong>Get ready to create users who are part of the sales organization by reviewing the list of available resource roles and the rules that provision the permissions users need to carry out their jobs. The resource roles appear as titles in the Resource Directory.</strong></td>
<td>Create Sales Users</td>
</tr>
<tr>
<td>- Manage Resource Roles</td>
<td></td>
</tr>
<tr>
<td>- Manage HCM Role Provisioning Rules</td>
<td></td>
</tr>
</tbody>
</table>

If you assign users with the standard resource roles provided by Oracle, then the users are provisioned with the appropriate functional and data access. If you create additional resource roles, such as the CEO,
### Setup Description

Then you must also create the accompanying role provisioning rules.

After checking the notification preferences in the Security Console to make sure you do not spam any users you create, create the user and the resource organization at the top of the resource hierarchy from the Manage Users work area. You can create additional users in this UI as well.

Import the rest of the sales resource hierarchy from using the R12 Sales User Quick Import Macro provided by Oracle.

You can download this and similar macros you will use to import other objects described in this guide from My Oracle Support (Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1)).

As part of the resource hierarchy, you must create at least one sales administrator user who will maintain territories, sales methods, and other sales-related standards after the initial implementation.

In the Users tab of the Security Console, reset the password for any users you want to use for testing.

Create the sales catalog listing the goods and services you sell. You create the top product group of the catalog hierarchy manually in the UI. You import products and the rest of the product groups using Excel macros provided by Oracle.

Before you import products, you must perform some prerequisite setups. These include:

- Creating the units of measure
- Creating a location
- Creating the item master organization and setting a system profile option for it
- Specifying the item master organization you created in system profile Sales Products Item Organization
- Identifying the item master organization as the default organization for import using the Manage Spoke Systems task

<table>
<thead>
<tr>
<th>Setup Description</th>
<th>Task Names</th>
<th>Implementation Project Folder</th>
</tr>
</thead>
<tbody>
<tr>
<td>then you must also create the accompanying role provisioning rules.</td>
<td>Manage Application Security Preferences, Manage Users</td>
<td>Create Sales Users</td>
</tr>
<tr>
<td>After checking the notification preferences in the Security Console to make sure you do not spam any users you create, create the user and the resource organization at the top of the resource hierarchy from the Manage Users work area. You can create additional users in this UI as well.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Import the rest of the sales resource hierarchy from using the R12 Sales User Quick Import Macro provided by Oracle.</td>
<td>Manage File Import Mappings</td>
<td>Create Sales Users</td>
</tr>
<tr>
<td>You can download this and similar macros you will use to import other objects described in this guide from My Oracle Support (Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1)).</td>
<td></td>
<td></td>
</tr>
<tr>
<td>As part of the resource hierarchy, you must create at least one sales administrator user who will maintain territories, sales methods, and other sales-related standards after the initial implementation.</td>
<td>Manage Application Security Preferences</td>
<td>Create Sales Users</td>
</tr>
<tr>
<td>In the Users tab of the Security Console, reset the password for any users you want to use for testing.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create the sales catalog listing the goods and services you sell. You create the top product group of the catalog hierarchy manually in the UI. You import products and the rest of the product groups using Excel macros provided by Oracle.</td>
<td>Manage Product Groups, Manage Units of Measure, Manage Locations, Manage Item Organizations, Manage Administrator Profile Values, Manage Spoke Systems, Manage Product Group Usage, Manage File Import Mappings, Refresh Denormalized Product Catalog Table for BI, Manage Opportunity Profile Options</td>
<td>Create Sales Catalog</td>
</tr>
</tbody>
</table>
**Setup Description**  
You must enable browsing of the sales catalog while editing opportunities by setting the system profile option Browse Sales Catalog in Opportunities Enabled (MOO_ENABLE_BROWSE_CATALOG), to Yes.

To test your setup, you must sign in as a salesperson and create an opportunity.

**Get ready to import sales accounts and contacts by:**
- Exporting the Party IDs of the sales resources you created earlier
- Specifying which industry classification category you are using by setting the profile option MOT_INDUSTRY_CLASS_CATEGORY.
- Reviewing the classification codes for the industry classification category you are using. You must enter these codes into your import macro.

**Import your accounts, contacts, and account hierarchies using the Excel macros provided by Oracle:**
- R12 Account Quick Import Macro
- R12 Account Import Macro Mapping
- R12 Account Hierarchy Quick Import Macro

Before you can use the macros, you must use the Manage File Import Mappings task to upload mapping files which tell the application how the columns in the macro map onto the application fields.

**Set up templates for sales campaigns and set the Allow Treatment Template profile option to the template you want users to see by default.**
Salespeople can use sales campaigns to keep their contacts informed, announce product launches, and invite them to events.

**Set up sales territories and assignment.** This setup is in four parts. You:
1. Configure the sales territory management feature for the types of territories you plan to create.
2. Set up the sales territories themselves.
3. Set assignment options.

<table>
<thead>
<tr>
<th>Task Names</th>
<th>Implementation Project Folder</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule Export Process</td>
<td>Import Accounts and Contacts</td>
</tr>
<tr>
<td>Manage Classification Categories</td>
<td>Import Accounts and Contacts</td>
</tr>
<tr>
<td>Manage Administrator Profile Values</td>
<td>Import Accounts and Contacts</td>
</tr>
<tr>
<td>Manage File Import Mappings</td>
<td>Import Accounts and Contacts</td>
</tr>
<tr>
<td>Manage Marketing Treatment Templates</td>
<td>Set Up Sales Campaigns</td>
</tr>
<tr>
<td>Manage Marketing Profile Options</td>
<td></td>
</tr>
<tr>
<td>Manage Territory Geographies</td>
<td>Set Up Territories and Assignment</td>
</tr>
<tr>
<td>Enable Dimensions and Metrics</td>
<td></td>
</tr>
<tr>
<td>Manage Territory Proposals</td>
<td></td>
</tr>
<tr>
<td>Manage Opportunity Profile Options</td>
<td></td>
</tr>
<tr>
<td>Request Account Assignments</td>
<td></td>
</tr>
<tr>
<td>Request Revenue Territory Based Assignment</td>
<td></td>
</tr>
<tr>
<td>Setup Description</td>
<td>Task Names</td>
</tr>
<tr>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>4.</strong> Run assignment processes Request Account Assignments and Revenue Territory Territory Batch Assignment. Create the assignment rule to assign the leads to the inside sales representatives who will qualify them. Enable lead assignment using rules and sales territories by setting two profile options: Setting Lead Assignment Mode and Assignment Rule for Rule Based Lead Assignment. The rules assign the imported leads to inside sales representatives and the sales territories assign the leads to the appropriate field sales representatives. Optionally customize the values provided by Oracle for lead rank and the lead source channel. Import leads using the Lead Quick Import Excel macro. Before you import, you must upload the mapping to your environment using the Manage File Import Mappings task. Run the lead assignment process twice: the first time to assign the imported leads to inside sales and the second time on a regular schedule to assign qualified leads to field sales. Create a list that inside sales representatives use to view the imported leads that are available for them to work on. Create a lead qualification template and make that the default for leads by selecting it in Advanced Lead Qualification Enabled. The template includes the questions you want the inside sales representatives to answer before they qualify the lead. Set system profile Account Type Default so that accounts created from leads are labeled as prospects. Create the list of competitors for the Primary Competitor field in the Edit Opportunity page. By default, Oracle Sales Cloud requires salespeople to enter the primary competitor whenever they close an opportunity. Unless you changed that default, you must create the list of competitors to enable opportunity closing.</td>
<td>Manage Sales Lead Assignment Rules</td>
</tr>
<tr>
<td></td>
<td>Manage Sales Lead Profile Options</td>
</tr>
<tr>
<td></td>
<td>Manage Set Enabled Lookups</td>
</tr>
<tr>
<td></td>
<td>Manage File Import Mappings</td>
</tr>
<tr>
<td></td>
<td>Manage Lead Processing Activities</td>
</tr>
<tr>
<td></td>
<td>There is no task in the implementation project for this setup. Follow the instructions in the topic.</td>
</tr>
<tr>
<td></td>
<td>• Manage Sales Lead Qualification Templates</td>
</tr>
<tr>
<td></td>
<td>• Manage Sales Lead Administrator Profile Values</td>
</tr>
<tr>
<td></td>
<td>Manager Administrator Profile Values</td>
</tr>
<tr>
<td></td>
<td>Create Competitors</td>
</tr>
<tr>
<td>Setup Description</td>
<td>Task Names</td>
</tr>
<tr>
<td>---------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Set opportunity assignment to automatic by setting Assignment Submission at Save</td>
<td>• Manage Sales Methods and Sales Stages</td>
</tr>
<tr>
<td>Yes. Account assignment is automatic by default.</td>
<td>• Manage Opportunity Profile Options</td>
</tr>
<tr>
<td>Configure sales coach, sales methods and stages, and opportunity close behavior.</td>
<td></td>
</tr>
<tr>
<td>Import opportunities and their revenue lines using the R12 Opportunity Quick Import</td>
<td>Manage File Import Mappings</td>
</tr>
<tr>
<td>Macro provided by Oracle. Before you import, you must upload the mapping to your</td>
<td></td>
</tr>
<tr>
<td>environment using the Manage File Import Mappings task.</td>
<td></td>
</tr>
<tr>
<td>Set up Oracle Social Network for the different objects in your application. For</td>
<td>Manage Oracle Social Network Objects</td>
</tr>
<tr>
<td>example, you can enable team conversations directly in opportunities.</td>
<td></td>
</tr>
<tr>
<td>Set up sales quotas.</td>
<td>• Manage Sales Quota Seasonality Groups</td>
</tr>
<tr>
<td>• Manage Sales Goals</td>
<td>• Manage Sales Quota Plans</td>
</tr>
<tr>
<td>• Synchronize Quotas</td>
<td></td>
</tr>
<tr>
<td>Set up forecasting options and criteria.</td>
<td>• Select Forecasting Options</td>
</tr>
<tr>
<td>• Manage Standard Lookups</td>
<td>• Manage Sales Forecasting Schedulable Processes</td>
</tr>
<tr>
<td>Optionally, set up product recommendations using Sales Predictor.</td>
<td>Recommendations work area, available in the Navigator under the Sales</td>
</tr>
<tr>
<td>You can integrate Gmail and Google Calendar with Oracle Sales Cloud. You turn</td>
<td>heading.</td>
</tr>
<tr>
<td>the integration by setting system profile options and run a synchronization</td>
<td>• Manage Administrator Profile Values</td>
</tr>
<tr>
<td>process. Each user then downloads a Chrome extension.</td>
<td>• Synchronization Between Sales Cloud and Gmail</td>
</tr>
<tr>
<td>Optionally, enable Microsoft Outlook integration.</td>
<td>Select Set Preferences from the Personalization menu.</td>
</tr>
<tr>
<td>Optionally, set up Oracle Sales Cloud Mobile on your mobile devices.</td>
<td></td>
</tr>
<tr>
<td>Installation involves downloading the application on your mobile device and</td>
<td></td>
</tr>
<tr>
<td>entering the correct URL.</td>
<td></td>
</tr>
</tbody>
</table>
4 Setting Up User Account Preferences

User Account Preferences Setup Overview

Before you create your first users, you must initialize the Security Console work area and then use it to review the default preferences the application uses, including user name format and password strength. You can also configure the e-mail notifications users receive regarding their accounts. Use the Security Console only for the tasks described in this chapter. Some features are more advanced or do not apply to Oracle Sales Cloud. See the About Using the Security Console in Oracle Sales Cloud Initial Setup topic in this chapter for details.

The following table lists and describes the tasks covered in this chapter. You can open these tasks from the implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Initialize the Security Console work area by importing users.</td>
<td>Import Users and Roles into Application Security</td>
<td>See the Initializing the Security Console topic in this chapter.</td>
</tr>
<tr>
<td>2</td>
<td>Setup preferences for user name format, passwords, and notifications in the Security Console.</td>
<td>Security Console</td>
<td>See the Setting Up Preferences for User Names, Passwords, and Notifications topic in this chapter.</td>
</tr>
</tbody>
</table>

Initializing the Security Console

You must initialize the Security Console before using it for the first time by running the process Import Users and Roles into Application Security task. The process copies users, roles, privileges, and data security policies from the LDAP directory, policy store, and Applications Core Grants schema to Oracle Fusion Applications Security tables. Having this information in the Oracle Fusion Applications Security tables makes the assisted search feature of the Security Console fast and reliable. After the process runs to completion for the first time, Oracle recommends that you schedule the process to run daily.

To run the process, do the following:

1. While signed in as the initial user, open the Import Users and Roles into Application Security task from the Set Up Security Console and Preferences folder in the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.
2. On the Import Users and Roles into Application Security page, click Submit. This action starts the Import User and Role Application Security Data process. After the process completes, you can use the Security Console.
3. Now set up this same process to run daily:
   a. On the Import Users and Roles into Application Security page, click Advanced.
   b. Click the Schedule tab.
   c. Select the Using a schedule option.
   d. From the Frequency list, select Daily.
e. Enter an end date far in the future.
f. Click Submit.

Setting Up Preferences for User Names, Passwords, and Notifications

Video

Watch: This tutorial shows you how to set user name, password, and account notification preferences for creating users in Oracle Sales Cloud. The content of this video is also covered in text topics.

Procedures

Use the Administration tab of the Security Console work area to set your preferences for user names, passwords, and notifications. For example, you can require users to set stronger passwords, implement shorter user names, and change the text of the notifications your users receive.

1. Open the Security Console work area using the Manage Applications Security Preferences task from the Set Up Security Console and Preferences folder in the implementation project. Alternatively, you can open the work area from the springboard by clicking Tools and Security Console.

2. Click the Administration tab.

The Administration tab displays the General subtab and includes a number of other subtabs. For the initial setup, you use only the General subtab and the Notifications subtabs.

3. Carry out any of the tasks on the General subtab as described in the following table.

4. You must click Save on the subtab before selecting another subtab.

The following table describes the initial setup tasks you can carry out in the General subtab of the Administration tab. The callout numbers refer to the figure that follows the table. See the Securing Sales guide for additional and more advanced tasks you can perform on this tab.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Region Name</th>
<th>What You Can Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>User Preferences</td>
<td>Set user name format preferences. The application uses your selection to generate user names if you don’t enter them manually or import them from a file. By default, the application uses the e-mail address as the user name. If you are implementing Partner Relationship Management, then you must use e-mail address for creating partner contacts.</td>
</tr>
<tr>
<td>Callout Number</td>
<td>Region Name</td>
<td>What You Can Do</td>
</tr>
<tr>
<td>----------------</td>
<td>------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Otherwise, you can use any of the following options:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• First name.last name</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• E-mail</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• First initial and last name</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Do not use the <strong>Person or party number</strong> option because numbers are not easily remembered by users. For example, if the person number generated by the application for John Smith is 100000000178803, then the user name is 100000000178803 as well.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The <strong>Generate system user name when generation rule fails</strong> option ensures the application generates a user name even if there is no information available for the option you selected.</td>
</tr>
<tr>
<td>2</td>
<td>Password Policy</td>
<td>Specify password strength and expiration. For example, you can require users to use special characters in passwords in addition to capital letters and numbers and set the number of days passwords must be changed.</td>
</tr>
<tr>
<td>3</td>
<td>Notifications subtab</td>
<td>After clicking <strong>Save</strong> on the General subtab, you can click the Notifications subtab. On the subtab you can configure the e-mail notifications users receive regarding their accounts and passwords or you can turn off user notifications entirely.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>See the procedure described in the Configuring E-Mail Notifications to Users Section that follows.</td>
</tr>
<tr>
<td>4</td>
<td>Synchronization Process Preferences</td>
<td>Change the frequency of the synchronization process warning.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Whenever you navigate to the Security Console, you get a warning if the Import User and Role Application Security Data process was not run in the last six hours. You can change the frequency of the warning by setting the <strong>Hours Since Last Synchronization Job Run Warning</strong> option. If you schedule the process to run daily, then you may want to increment this option to a value greater than 24.</td>
</tr>
</tbody>
</table>
The following figure shows the Administration tab highlighting the initial setup tasks described in the previous table.

Configuring E-Mail Notifications to Users

In the Notifications subtab of the Security Console Administration tab, you can specify which e-mail notifications, if any, are sent to users and the text of the notifications. At present, Oracle Sales Cloud supports text-only notifications in one language.

You can:

- Turn all notifications on or off.
  
  By default, all notifications are turned on. If you are setting up a test environment, turn off notifications while creating users you need for testing, for example.

- Turn individual notifications on or off.
  
  By default, individual notifications are turned on.

- Create your own notifications.

  Oracle provides predefined English-language templates with Oracle-specific language. You can edit the predefined templates or create your own notification templates. Creating your own templates preserves your changes during upgrades.

To configure e-mail notifications:

1. From the implementation project, open the Manage Application Security Preferences task. Alternatively, you can open the work area from the springboard by clicking Tools and Security Console.
2. Click the Administration tab.
3. Click the Notifications tab.
The tab displays the available notifications and provides you with the option of turning off all notifications.

The following figure shows the Notifications subtab on the Security Console Administration tab.

4. If you want to turn off all notifications, then deselect the **Enable Notifications** option and click **Save**.

5. If you want to turn off individual notifications, then:
   a. Click the template name link.
   b. Deselect the **Enabled** check box.
   c. Click **Save and Close**.

6. If you want to create your own notifications, then Click **Add Template** and create the template.

   **Tip:** You can copy the text of the preconfigured template to Notepad before you create your own to help you get started.

When you enable your template by selecting the **Enabled** option, the predefined template provided by Oracle is automatically disabled. You can only have one template per event.

**Related Topics**
- Managing User-Name and Password Notifications: Explained

### About Using the Security Console in Oracle Sales Cloud

**Initial Setup**

To complete the initial setup tasks in Oracle Sales Cloud, use the Security Console work area only for the tasks recommended in this guide. For information about more advanced tasks, including security configuration, see the Securing Sales and Extending Sales guides. You must use the Manage Users work area, and not the Security Console, for creating users and for provisioning the users with the job roles they need to do their work.
The following table lists the tabs in the Security Console work area and provides an overview of the tasks you can perform on those tabs. Only setup users, or other users with the IT Security Manager job role, can access the Security Console.

<table>
<thead>
<tr>
<th>Tab</th>
<th>How to Use It</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roles</td>
<td>Use the Roles tab for creating your own roles as described in Securing Sales guide.</td>
</tr>
</tbody>
</table>
| Users       | Use the Users tab to manage user passwords and to update user e-mail addresses as described in this guide. Do not use this tab to create users or to provision job roles. For Oracle Sales Cloud, you must use the Manage Users work area to create users, provision job roles, and change user names.

All users, even members of the sales organization who cannot access the Security Console, can reset their own passwords by clicking the user name in the welcome page and selecting the Preferences option from the Settings and Actions menu.

| Analytics   | Advanced security functionality covered in the Securing Sales guide.          |
| Certificates| Oracle Sales Cloud does not use this functionality.                           |
| Administration | Use the Administration tab to specify user name formats, manage password requirements, and configure notification templates as described in this guide. Other advanced features are covered in the Securing Sales guide. |
5 Creating Setup Users

Setup Overview

The initial user created for you by Oracle is configured to perform security tasks, which include the creation of other users and the granting of additional privileges. After you have signed in for the first time, you are ready to provide yourself with additional privileges and to create other users who will help you with application setup. This chapter assumes that the users doing the setup are not resources who are part of the sales organization. However, there is nothing stopping you from providing setup privileges to users who are.

Read the conceptual overview provided in the About Creating Setup Users topic and perform the setups outlined in the following table. Detailed steps are provided in procedures in this chapter.

You can access all tasks from the Create Setup Users folder in your implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create a job, Customer Administrator, which you will later assign to all users who are performing setup and are not part of the sales organization. What you name the job doesn’t matter. You will use the job only as a condition in the rule to provision setup users with the permissions they need to complete all setups.</td>
<td>Manage Job</td>
<td>Creating a Job for Provisioning Setup Users topic in this chapter.</td>
</tr>
</tbody>
</table>
| 2    | Create a role provisioning rule that automatically provisions the following job roles to all users with the Customer Administrator job:  
  - Application Implementation Consultant  
  - IT Security Manager  
  - Application Diagnostic Administrator  
  - Sales Analyst  
  - Sales Administrator | Manage HCM Role Provisioning Rules | See Creating the Provisioning Rule for Setup Users topic in this chapter. |
| 3    | Create each setup user as a user of type employee with the Customer Administrator job. | Manage Users | See Creating Setup Users topic in this chapter. |
| 4    | Grant yourself, the initial user, the same additional privileges the other setup users have by editing the initial user profile. | Manage Users | See Granting the Initial User the Same Privileges as Other Setup Users topic in this chapter. |
About Creating Setup Users

Video

Watch: This tutorial briefly explains the difference between creating sales application users and creating the setup users who complete the initial implementation tasks in Oracle Sales Cloud.

About Creating Setup Users

Although the initial user can perform many of the setup tasks in this guide, this user cannot perform all of them without additional privileges. For example, the initial user cannot run scheduled processes, including the geography import task and indexing for searches.

About Security and the Initial Setup Tasks

Oracle follows the industry standard Role Based Access Control (RBAC) approach to security. In Oracle Sales Cloud, the privileges are bundled in:

- Job roles, which correspond to the jobs that the person is doing in your organization
- Abstract roles, which permit users to carry out tasks that are common to all employees or resources.

For example, the Sales Manager job role makes it possible for a user to perform all of the sales manager duties, such as reviewing sales team performance and approving forecasts. The Employee abstract role adds the ability to access reports and manage personal profile information. The Resource abstract role makes it possible for a user to be assigned as a sales resource to accounts and opportunities.

To perform the initial setup tasks in this guide, you must provision users with all the job roles granted to the initial user. These job roles are:

- Application Implementation Consultant (job role)
  Provides access to all setup tasks across all products.
- IT Security Manager (job role)
Provides access to security tasks, including the ability to assign other enterprise roles.

- Application Diagnostics Administrator (job role)
  Provides access to diagnostic tests and data.

In addition, you also provision them with:

- Employee (abstract role)
  Provides access to BI reports and the ability to run and monitor background processes.

- Sales Analyst (job role)
  Makes it possible to create Sales Predictor rules.

- Sales Administrator (job role)
  Makes it possible to perform the same duties as sales administrators. Sales administrators perform ongoing administrative tasks, correct erroneous data, and customize the application according to business needs.

If you want to perform the initial setup tasks in this guide using the initial user, then you must provision these additional roles to yourself as well.
In Oracle Sales Cloud, you provision job roles and abstract roles to users using role provisioning rules. The following figure shows a rule, which consists of conditions and the job roles and abstract roles that are assigned to the user if the conditions are met.

The role provisioning rules that you use to provision sales application users and the initial setup users use different conditions.
Provisioning Sales Application Users

You provision job roles to sales users, including sales managers, salespeople, and sales administrators, based on the role the user plays in the resource organization. The resource role is the job title which appears under the user name in the Resource Directory (callout 1 in the following figure).

Special Provisioning Rule for Setup Users

Because users doing the initial setup aren’t part of the sales organization, you don’t want them to be a part of the resource hierarchy and you don’t want them to appear in the Resource Directory. For these reasons, you do not create setup users as resources, and you do not assign them resource roles.
Because setup users don’t have resource roles, you must create a special role provisioning rule that uses a different field as the condition. You create a Customer Administrator job, a field not normally used in Oracle Sales Cloud, and provision the setup user job roles based on this job.

The following figure illustrates the two provisioning rules used to provision the setup user. You must create the rule to provision the setup job roles to users with the Customer Administrator job. The employee role provisioning rule is already set up for you by Oracle if you are implementing Oracle Sales Cloud by itself. If you are implementing your application in a Global Single Instance (GSI) environment, then, you must set up all provisioning rules yourself.

What Happens When You Create Users

When you create users, Oracle Sales Cloud:

- Creates accounts and user names
- Provisions the job roles and abstract roles the users need to carry out their jobs
- Based on your preference, the application can send users an e-mail notification with the URL required to sign in for the first time.
Creating a Job for Provisioning Setup Users

Video

Watch: This video tutorial shows you how to create a job that you will use for provisioning setup users with the permissions they need for the initial implementation.

Procedure

Use this procedure to create a job that you can use to assign setup users with implementation privileges. You use this job as a condition in the provisioning rule you create and assign the job to the users.

Creating the Job

1. Sign in as the initial user.
2. If you downloaded and imported the implementation project, then open the task Manage Job from the implementation project. Alternatively, you can search for the same Manage Job task by name in the Setup and Maintenance work area.

To open the task from the implementation project:
   a. Navigate to the Setup and Maintenance work area by clicking the Setup and Maintenance icon on the springboard. The springboard is the page you see when you first sign in.
   b. Click Implementation Projects.
   c. In the Search Results region on the Implementation Projects page, click the name link for the project.
   d. Open the Create Setup Users folder.
   e. Click the Go to Task icon for the Manage Job task.

The Manage Jobs page appears.

3. Click Create.

The Create Job: Basic Details page appears.

4. Enter Customer Administrator in the Name field.
5. Enter a name without spaces, for example CustomerAdministrator, in the Code field.
6. You can keep the other field values as they are because you are creating this job only for the purposes of provisioning job roles to setup users.
7. Click Next at the top of the page.
8. Click Submit on the next page, and close the warning by clicking Yes.

The job may take a couple of minutes to create. You can use search on the Manage Job page to verify that it has been created.
Creating the Provisioning Rule for Setup Users

Video

Watch: In this tutorial, you learn how to create the role provisioning rule that provisions setup users with the permissions they need for setup when you assign them the job you created earlier.

Procedure

Use this procedure to create the provisioning rule which automatically provisions users assigned the Customer Administrator job with the job roles required to perform the initial setup in this guide.

To create the provisioning rule:

1. Sign in as the initial user and open the Manage HCM Role Provisioning Rules task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.

   The Manage Role Mappings page appears.

2. Click Create.
3. In the **Mapping Name** field, enter **Customer Administrator**, or another name that will help you identify this mapping in the future.

4. In the **Conditions** region, select **Customer Administrator**, the job you created earlier, from the **Job** list. If the job does not appear in the list, click **Search** and search for it using the full name.

5. Select **Active** from the **HR Assignment Status** list.

   This additional condition ensures that any provisioned job roles are automatically removed if the user is terminated.

6. In the **Associated Roles** region, click **Add** and select each of the following job roles:
   - Application Implementation Consultant
   - IT Security Manager
   - Application Diagnostics Administrator
   - Sales Analyst
   - Sales Administrator

7. Make sure the **Autoprovision** option is selected for all the job roles.
8. Click **Save and Close**.

### Creating Setup Users

**Video**

**Watch:** In this tutorial, you learn how to create setup users and automatically provision them with the setup job and abstract roles they need using the role-provisioning rule you created. The content of this video is also covered in text topics.

#### Procedure

After you have created the provisioning rules, you are ready to create other setup users in the UI.

To create a setup user:

1. While signed in as the initial user (or a setup user, if you already created another one), open the Manage Users task in the implementation project. Alternatively, you can click the **Manage Users** link under the **My Team** heading in the Navigator.
   
   The Manage Users page appears.

2. Click **Create**.
   
   The Create User page appears.

3. Enter the user's name and a unique e-mail address in the Personal Details region.
   
   The application automatically sends user notifications to this e-mail address unless you disable notifications in the Administration tab of the Security Console. After you create the user, you can no longer update the e-mail address in the Manage Users work area. You can update the e-mail address on the Users tab in the Security Console work area.

4. In the User Details region, enter the user name.
   
   If you leave the **User Name** field blank, then the application automatically creates a user name for you. By default, the application uses the e-mail as the user name. You can change the default format using the Security Console.

5. Selecting the **Send user name and password** option in the User Notification Preferences region sends users a URL they can use to reset their password and sign in. The application sends the e-mail notification immediately after you save the user record for the first time. This option is available only before you save. After you save the record, you must instead use the Users tab in the Security Console work area to reset the password and send the notification as described in a related topic.

6. In the **Employment Information** region, enter the following:
   
   a. Select **Employee** from the **Person Type** list.
   
   b. From the **Legal Employer** list, select the only value available, the legal employer Oracle created for you using the information you provided when you signed up with Oracle Sales Cloud.
   
   c. From the **Business Unit** list, select the only value available, the business unit created for you when you signed up.
From the Job list, select Customer Administrator, the job you just created. If the job is not in the list, then you must search for it by clicking Search...

7. Click Autoprovioin Roles.

The Role Requests region displays the following roles:

- Application Diagnostics Administrator
- Application Implementation Consultant
- IT Security Manager
- Employee
- Sales Analyst
- Sales Administrator

The role request process may take a few minutes to complete because it is set to run periodically. You can view the status of the request any time you edit this user. When the process is complete, the roles appear in the Current Roles region.

8. Click Save and Close.

If you selected the Send user name and password option, then the application automatically sends the e-mail with the initial sign-in URL to the e-mail address you provided for the user. If you did not select this option, then you must reset the password using the procedure described in the Resetting User Passwords topic.
Granting the Initial User the Same Privileges as Other Setup Users

Use this procedure to grant the initial user the same privileges as the other setup users:

1. While signed in as the initial user (or a setup user, if you already created another one), open the Manage Users task in the implementation project. You can also click the Manage Users link under the My Team heading in the Navigator.

   The Manage Users page appears.

2. Enter the first name of the initial user in the Keywords field and click Search (the right arrow).

3. Select the name link in the Search Results.

   The Edit User page appears.

4. In the Employment Information region, select Customer Administrator from the Job list. This is the job you created earlier. If the job is not listed, then click Search... and search for it by name.

   ![Employment Information](image1)

5. Click Autoprovision Roles.

   ![Autoprovision Roles](image2)

The Role Requests region displays the following roles:

- Sales Analyst
- Employee
Sales Administrator

Your role request may take a few minutes to complete because it is fulfilled by a process which is set to run periodically. You can view the status of the request any time you edit this user. When the process is complete, the roles appear in the Current Roles region.

6. Click **Save and Close**.

If you are signed in as the initial user, you must sign in again for the new privileges to take effect.

---

**Resetting User Passwords and Updating E-Mail Addresses**

**Resetting User Passwords**

Setup users, who are provisioned with the IT Security Manager job role, can use the Users tab in the Security Console work area to reset passwords for all application users. Users who cannot access the Security Console can reset only their own passwords using the **Set Preferences** link in the **Settings and Actions** menu available by clicking their user name in the application or by using the **Forgot Password** link on the sign-in page.

**Note:** Use the Security Console only for changing passwords and for updating user account information such as user first and last name, e-mail address, and status. To manage users, use the Manage Users work area.

To reset a user’s password in the Security Console, do the following:

1. From the implementation project, open the **Manage Applications Security Preferences** task. Alternatively, you can search for this task by name in the Setup and Maintenance work area or use the Navigator.

   You can close any warnings regarding the scheduling of the Import Users and Roles Application Security Data job.

2. Click the **User Accounts** tab.

3. Search for the user using one of the following:

   - First or last name, but not both
   - User name
The following figure shows a screen capture of the User Accounts tab in the Security Console work area. Callout 1 highlights the location of the Action menu.

4. From the **Action** menu, select **Reset Password**.

The Reset Password window appears, shown in the following figure. The window displays the password strength policy, which is set on the Security Console Administration tab.

5. If you want the application to send an e-mail to users with a URL that they can use to create their own passwords, then select the **Automatically generate password** option.

6. To reset the password yourself, do the following:
   
   a. Select the **Manually change the password** option.
   
   b. Enter the new password twice.

   ✍️ **Note:** The option to reset a password to an automatically generated value is always available. For the manual-reset option, you must select the **Administrator can manually reset password** option on the Security Console **Administration** tab.

7. Click **Reset Password**.
Changing a User's E-mail Address

Use the Users tab in the Security Console work area to change user e-mail addresses. You can use the procedure described in this topic to update addresses of both setup users and sales users. If you are updating the e-mail addresses of sales users, then you can also use the same import process you use to create them.

To change a user's e-mail address, do the following:

1. While signed in as a setup user, navigate to the Security Console work area. You can close any warnings regarding scheduling of the Import Users and Roles Application Security Data job.

   **Note:** Limit your use of the Users tab to editing e-mail addresses and resetting user passwords. Use the Manage Users work area to create user accounts and make other user record changes, including provisioning additional roles, inactivating users, and editing user names.

2. Click the Users tab.
3. Search for the user using one of the following:
   - First or last name, but not both
   - User name

   The following figure shows the Users tab in the Security Console work area.

4. Click the user name link (callout 1).
   The User Account Details window appears.
5. Click Edit.
The Edit User Account window appears, as shown in the following figure.

6. Edit the e-mail address (highlighted by callout 1).
7. Click **Save and Close**.

How can I change or reset my password?

Use the Preferences page to change your password.

In the global header, click your user image or name and select **Set Preferences** in the Settings and Actions menu. Under General Preferences, click **Password**.
6 Setting Up the Accounting Calendar and Corporate Currency

Setup Overview

You must set up the accounting calendar that is used for forecasting and specify the corporate currency as described in this chapter.

Read the short conceptual descriptions in each chapter section and complete the setup steps in the following table. Detailed steps are provided in separate procedures.

You can open all setup tasks from the Set Up Accounting Calendar and Currency folder in your implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create the calendar and generate the periods for past and future years. For Oracle Sales Cloud you create only one calendar.</td>
<td>Manage Accounting Calendars</td>
<td>See the Creating the Accounting Calendar topic in this chapter.</td>
</tr>
<tr>
<td>2</td>
<td>Designate the calendar you just created as the calendar you intend to use by setting the Accounting Calendar Default profile option.</td>
<td>Manage Calendar Profile Option</td>
<td>See the Enabling the Accounting Calendar You Created topic in this chapter.</td>
</tr>
<tr>
<td>3</td>
<td>Enable the time periods you generated for analytics and reports by running the process Refresh Denormalized Time Dimension Table for BI. You can run this process directly from the implementation project or from the Scheduled Processes work area.</td>
<td>Refresh Denormalized Time Dimension Table for BI</td>
<td>See the Enabling the Time Periods You Generated for Analytics and Reports topic in this chapter.</td>
</tr>
<tr>
<td>4</td>
<td>Your application is set up to operate with one default corporate currency. By default, the corporate currency is set to US dollar. If your organization operates in a different corporate currency, then you must select that currency by setting the profile option ZCA_COMMON_CORPORATE_CURRENCY.</td>
<td>Manage Currency Profile Options</td>
<td>See the Specifying Your Corporate Currency in Oracle Sales Cloud topic in this chapter.</td>
</tr>
</tbody>
</table>
Setting Up the Accounting Calendar

About Setting Up the Accounting Calendar in Oracle Sales Cloud

The accounting calendar defines the start and end of your fiscal year and the time periods in that calendar, including the exact dates for each period. Oracle Sales Cloud uses these defined periods, often called enterprise periods, for multiple purposes. Examples include:

- Reports that provide amounts by enterprise period, such as a sales pipeline analysis
- Metrics calculations by period for territory analysis
- The ability to adjust forecast amounts by time period
- Distribution of quota amounts by time period

The period frequency set in your fiscal calendar is the shortest period you can use. Therefore, if you set the period frequency to yearly, then you can create reports and activities for the year, but cannot break them down by month. If you set the period frequency to monthly, then you can break down activities and reports by month and summarize by quarter and year. However, if you set the period frequency to weekly, then you can perform activities and reports by week, quarter, and year, but not by month because the number of weeks varies by month.

Creating the Accounting Calendar

Use this procedure to create the accounting calendar used in reporting and forecasting.

To create the accounting calendar:

1. While signed in as a setup user, open the task Manage Accounting Calendars from the implementation project or after searching for the task by name in the Setup and Maintenance work area.
2. On the Manage Accounting Calendars page, click Create.
3. Name your calendar, for example, Sales Calendar.
4. Leave the Adjusting Period Frequency set to None.
5. Enter a start date of January 1 for a year that is at least two years prior to the date of any historical data that you plan to use.
   You cannot change this entry after you start using the application, so consider using the year your company was created. Vision Corp. is using 1/1/10.
6. For Period Frequency, select the shortest time period you want to use for reports and activities.
   Vision Corp. selects Monthly. The period starts on the first of the month and ends on the last day of the month, regardless of the number of days or weeks in each month. Another choice, for example, is where the first two months consist of 4 weeks, and the third month contains 5 weeks.
7. Your entries in the Period Name Format region determine how the period names appear in the UI. The First Period field provides a preview of your name format. You can:
   - Enter a prefix to the period
   - Select a separator
   - Select the format
Vision Corp. selects **None** as the **Separator** and selects **MMYY calendar year** for the **Format**.

8. Click **Next**.

   The application generates the periods, with start and end dates, for the first year (2010 for Vision Corp.) and displays them on the Create Accounting Calendar: Period Details page.

   The following figure shows a screen capture of the page with periods generated for the Vision Corp. use case. Each generated period represents one month in the year. It starts on the first day of the month and ends on the last day of the month.

9. If needed, you can manually change the details for each period.

   \[\textbf{Note:}\] The start date of the first period for the year defines the start of the fiscal year. The end date of the last period for the year defines the end of the fiscal year.

10. Click **Save and Close**.

11. Now generate the calendar periods for all the past and future years. You must generate enough years into the future to permit forecasting. Oracle recommends that you create periods for five years into the future. For each year do the following:

    a. Edit the calendar.
       
       The Edit Accounting Calendar page appears.
    b. Click **Add Year**.
    c. Click **Save**.
12. When you have completed adding all the years, click Save and Close.

13. Click Done.

Note: After you start using the calendar, you can generate additional years but you cannot change other calendar options.

Enabling the Accounting Calendar You Created

You enable the calendar you created by selecting it to be the default calendar. Many features of Oracle Sales Cloud use the common calendar, so changing the selected calendar in the future can result in the loss of data.

To enable the calendar:

1. While signed in as a setup user, open the task Manage Calendar Profile Option from the implementation project or after searching for the task by name in the Setup and Maintenance work area.
2. On the Manage Calendar Profile Option page, select the Accounting Calendar Default profile option.
3. In the Profile Values table, click New.
4. For Profile Level, select Site.
5. Click the Profile Value list, and select the name of the calendar you created.
6. Click Save and Close.

Enabling the Time Periods You Generated for Analytics and Reports

You must run the Refresh Denormalized Time Dimension Table for BI process to make the time periods you generated available for analytics and reports.

To run the process:

1. Sign in as a setup user.
2. If you’re using the implementation project, then click Go to Task for the Refresh Denormalized Time Dimension Table for BI task and click Submit.
3. If you are not using the implementation project, then you can run this process from the Scheduled Processes work area by following these steps:
   a. Open the Navigator and select Scheduled Processes under the Tools heading.
   b. Click Schedule New Process.
      The Schedule New Process window appears.
   c. Enter Refresh Denormalized in the Name field and press Return.
   d. Click OK.
      The Process Details window appears.
   e. Click Submit.
   f. Click OK to close the confirmation and then Close.
Specifying the Corporate Currency

Specifying Your Corporate Currency

Although Oracle Sales Cloud supports multiple currencies, multiple daily rates, and currency rate conversions, your application is set up to operate with one default corporate currency. By default, the corporate currency is set to US dollar. If your organization operates in a different corporate currency, then you must select that currency by setting the profile option ZCA_COMMON_CORPORATE_CURRENCY as described in this topic.

For information on implementing your application with multiple currencies, see the Implementing Sales guide, available on docs.oracle.com.

To set the default corporate currency profile option:

1. As a setup user, open the Manage Currency Profile Options task either from the implementation project or after searching for the task by name in the Setup and Maintenance work area.

   The Manage Currency Profile Options page appears.

2. Click ZCA_COMMON_CORPORATE_CURRENCY.

3. Set the profile option to the currency you want at the site level.

4. Click Save and Close.
7 Setting Up Geography Data

Setup Overview

You must import and set up reference geography data for the countries where you do business if you are setting up sales territories using geography as one of your dimensions or want to validate address entry.

Vision Corp. is doing both. It plans to set up sales territories based on states in the US, so it must import geography data for the US. Also, Vision Corp. wants its salespeople to use a list of values to enter the states in their addresses. The state in the address must be validated because invalid entries would cause opportunities to be left out of forecasts.

You must enable validation to the level of granularity you need for your territories. For example, if Vision Corp. decided to set up territories at the postal code level, then the company would have to set up validation for state, city, county, and postal code.

You can access all tasks for this setup from the Setup Geography Data folder in your implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Import geography data for the countries where you do business. You can import Oracle-licensed Nokia data for those countries where the data is available. This includes the US, used in our case study, and a growing list of other countries. If the licensed Nokia data is not available for a particular country, then the Import Nokia Data action is disabled. In this case, you must license geography data from another supplier and import it from a file. For more information about importing third party geography data, see the Importing Geographies chapter of the Oracle Sales Cloud File-Based Data Import Guide available on docs.oracle.com.</td>
<td>Manage Geographies</td>
<td>Importing Nokia Geography Reference Data and Countries Available for Import of Nokia Geography Reference Data topics in this chapter</td>
</tr>
<tr>
<td>2</td>
<td>For the countries you imported, enable validation down to address level required for your territories and specify which address elements require lists of values. When you enable validation on an address element, the application suggests alternatives during address entry. Enabling a list of values requires the user to make a selection from a list.</td>
<td>Manage Geographies</td>
<td>Setting Up Geography Validation topic in this chapter</td>
</tr>
</tbody>
</table>
### Setting Up Geography Data

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Both validation and lists of values are enforced in the UIs.</td>
<td>Setting Up Geography Validation topic in this chapter</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Vision Corp. enables list of values for entering states in addresses and enables validation for the states because its territories are defined at the state level.</td>
<td>Manage Administrator Profile Values</td>
<td></td>
</tr>
</tbody>
</table>

3. The validation selection you made affects entries made in the application UI only. You must use the task Manage Administrator Profile Values to set the profile option Geography Address Validation Enabled to Yes to validate addresses you import.

You must also make sure that the address data you import matches what the geography reference data expects. The Nokia geography reference data requires the states in the US to be spelled out and capitalized, for example. This means that California addresses you import must be CALIFORNIA, and not California, or CA.

### Importing Nokia Geography Reference Data

Use this procedure to import Nokia geography reference data licensed by Oracle. If the country data you want to import is not available, then the Import Nokia Data action is disabled.

> **Note:** The geography data is provided by Nokia and is third-party content. As per Oracle policy, this software and documentation may provide access to or information on content and services from third parties. Oracle and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content and services. Oracle and its affiliates are not responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

To import Nokia geography data:

1. Sign in as a setup user.
2. Open the **Manage Geographies** task directly from the implementation project or after searching for the task by name in the Setup and Maintenance work area.

   The Manage Geographies page appears.

3. Enter either the country name in the **Country Name** field or the two-letter ISO code of the country in the **Country Code** field.
Examples of ISO country codes include **US** (United States) and **AT** (Austria).

4. Click **Search**.

   The Search Results display the country.

5. Select the country in the search results. Do not click the link.

6. Select **Import Nokia Data** from the **Actions** menu.

7. Click **OK** to close the warning message.

8. Click **OK** to close the confirmation message.

The import of larger countries may require several hours to complete.

You can track the progress of the import process by selecting **Scheduled Processes** from the Navigator menu.

After the import is complete, you can search for the country again in the Manage Geographies page. The **Completed** icon (check mark) replaces **Go to Task** icon in the **Structure Defined** and **Hierarchy Defined** columns indicating the import completed successfully.

The following figure shows a screen capture of the Manage Geographies page after the import completes with the Completed icons (check marks) highlighted.

![Manage Geographies](image)

**Note:** Report any issues with Nokia data to Oracle Support who will contact the Nokia team for correction. Alternatively, you can make manual changes to the geography data by using the Manage Geographies task in the Setup and Maintenance work area. If you decide to use geography data from another data provider, then Oracle Support can delete the Nokia data and you can then load your data using File Import.

The **Geocoding Defined** and **Address Cleansing Defined** columns are used for additional features that you set up separately:

- Geocoding is a feature used to populate longitude and latitude for locations in a country. You must set up geocoding to enable mapping features in your application, such as the display of customer locations on a map in the UI. For details, see the Setting Up Geography chapter in the Oracle Customer Data Management Cloud Getting Started with Your Customer Data Management Implementation guide for details.

- Address cleansing makes it possible to validate addresses down to the street level. Note that to use address cleansing, you require a separate license for the Address Verification Cloud Service.
Countries Available for Import of Nokia Geography Reference Data

Nokia geography reference data is available for import for the countries listed in the following table.

<table>
<thead>
<tr>
<th>Country Name</th>
<th>Country Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Andorra</td>
<td>AD</td>
</tr>
<tr>
<td>Argentina</td>
<td>AR</td>
</tr>
<tr>
<td>Austria</td>
<td>AT</td>
</tr>
<tr>
<td>Belgium</td>
<td>BE</td>
</tr>
<tr>
<td>Brazil</td>
<td>BR</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>BG</td>
</tr>
<tr>
<td>Canada</td>
<td>CA</td>
</tr>
<tr>
<td>Cayman Island</td>
<td>KY</td>
</tr>
<tr>
<td>Chile</td>
<td>CL</td>
</tr>
<tr>
<td>Croatia</td>
<td>HR</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>CZ</td>
</tr>
<tr>
<td>Denmark</td>
<td>DK</td>
</tr>
<tr>
<td>Dominican Republic</td>
<td>DO</td>
</tr>
<tr>
<td>Estonia</td>
<td>EE</td>
</tr>
<tr>
<td>Finland</td>
<td>FI</td>
</tr>
<tr>
<td>France</td>
<td>FR</td>
</tr>
<tr>
<td>Country Name</td>
<td>Country Code</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Germany</td>
<td>DE</td>
</tr>
<tr>
<td>Greece</td>
<td>GR</td>
</tr>
<tr>
<td>Guadeloupe</td>
<td>GP</td>
</tr>
<tr>
<td>Holy See (Vatican City State)</td>
<td>VA</td>
</tr>
<tr>
<td>Hungary</td>
<td>HU</td>
</tr>
<tr>
<td>Iceland</td>
<td>IS</td>
</tr>
<tr>
<td>India</td>
<td>IN</td>
</tr>
<tr>
<td>Indonesia</td>
<td>ID</td>
</tr>
<tr>
<td>Ireland</td>
<td>IE</td>
</tr>
<tr>
<td>Isle Of Man</td>
<td>IM</td>
</tr>
<tr>
<td>Israel</td>
<td>IL</td>
</tr>
<tr>
<td>Italy</td>
<td>IT</td>
</tr>
<tr>
<td>Jamaica</td>
<td>JM</td>
</tr>
<tr>
<td>Latvia</td>
<td>LV</td>
</tr>
<tr>
<td>Liechtenstein</td>
<td>LI</td>
</tr>
<tr>
<td>Lithuania</td>
<td>LT</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>LU</td>
</tr>
<tr>
<td>Malaysia</td>
<td>MY</td>
</tr>
<tr>
<td>Malta</td>
<td>MT</td>
</tr>
<tr>
<td>Martinique</td>
<td>MQ</td>
</tr>
<tr>
<td>Mexico</td>
<td>MX</td>
</tr>
<tr>
<td>Netherlands</td>
<td>NL</td>
</tr>
<tr>
<td>Country Name</td>
<td>Country Code</td>
</tr>
<tr>
<td>-------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>New Zealand</td>
<td>NZ</td>
</tr>
<tr>
<td>Norway</td>
<td>NO</td>
</tr>
<tr>
<td>Peru</td>
<td>PE</td>
</tr>
<tr>
<td>Poland</td>
<td>PL</td>
</tr>
<tr>
<td>Portugal</td>
<td>PT</td>
</tr>
<tr>
<td>Puerto Rico</td>
<td>PR</td>
</tr>
<tr>
<td>Reunion Island</td>
<td>RE</td>
</tr>
<tr>
<td>Romania</td>
<td>RO</td>
</tr>
<tr>
<td>Russian Federation (Russia)</td>
<td>RU</td>
</tr>
<tr>
<td>San Marino</td>
<td>SM</td>
</tr>
<tr>
<td>Singapore</td>
<td>SG</td>
</tr>
<tr>
<td>Slovakia</td>
<td>SK</td>
</tr>
<tr>
<td>Slovenia</td>
<td>SI</td>
</tr>
<tr>
<td>South Africa</td>
<td>ZA</td>
</tr>
<tr>
<td>Spain</td>
<td>ES</td>
</tr>
<tr>
<td>Swaziland</td>
<td>SZ</td>
</tr>
<tr>
<td>Sweden</td>
<td>SE</td>
</tr>
<tr>
<td>Switzerland</td>
<td>CH</td>
</tr>
<tr>
<td>Taiwan</td>
<td>TW</td>
</tr>
<tr>
<td>Turkey</td>
<td>TR</td>
</tr>
<tr>
<td>United Arab Emirates</td>
<td>AE</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>GB</td>
</tr>
</tbody>
</table>
Setting Up Geography Validation

You must set up geography validation for those geography elements that you plan to use in your sales territories. Setting up validation also helps users fill in missing address information, and validate addresses during entry. For example, you can have users select states or other address elements from lists to ensure accuracy during entry, and you can have the application fill in missing values. For example, when the user enters a postal code, the application can retrieve the city and state.

Vision Corp. wants its salespeople to use a list of values to enter the states in their addresses and it plans to set up territories at the state level. For these reasons, validation must be set up at the state level.

Setting Up the Validation

1. Open the Manage Geographies task from the implementation project or after searching for the task by name in the Setup and Maintenance work area.

   The Manage Geographies page appears.

2. Search for a country you imported using either its name or its two letter ISO code. For example, you can search by entering either the country name United States or the two letter ISO code US, and clicking Search.

3. Select the country in the Search Results area.

   The following figure shows the location of the Go to Task icon in the Validation Defined column on the Manage Geographies page.

4. Click Go to Task in the Validation Defined column.

   The Manage Geography Validation page appears.
5. In the Address Style region, ensure that the **No Styles Format** address style is selected. You define validation for the No Styles Format address style so that the validations are performed for all addresses in the country.

> **Note:** The setup of address styles for your application is done elsewhere, using the Manage Address Formats task.

6. Select **Enable List of Values** in the Geography Mapping and Validation region to display the geography type as list of values during address entry in the UI. For example, to have users select states from a list, select **Enable List of Values** for **State**.

Vision Corp. enables the list of values for **State** because the company uses states for its sales territories and wants to assure that state names are always entered correctly.

7. Select **Geography Validation** for all the geography types that you plan to use in territories.

In our example, Vision Corp. plans to use set up geographies by state, so it selects **Geography Validation** for **State**.
The following figure shows the location of the Enable List of Values and Geography Validation options for the US State geography type.

You must enable geography validation for all geography levels above the level you are planning to use for territories. If Vision Corp. decided to set up territories at the postal code level, it must select Geography Validation for state, city, county, and postal code.

**Note:** If you do not select the validation for an address element, then the application still suggests values to the user during address entry, but the application does not validate the address element.
8. Specify if you want to permit addresses that are not considered valid by the application to be saved by making a selection from the **Geography Validation Level for Country** list.
   - **No validation**, the default value, permits users to save incomplete or incorrect addresses.
   - The **Error** value permits only valid addresses to be saved.

   Vision Corp. wants to save all addresses including incomplete and invalid addresses, so it keeps the **No validation** default value.

9. Click **Save and Close**.
10. Click **Done** in the Manage Geographies page.

### Turning on Validation for Address Import

By default, the validation you specified is enforced for creating addresses in the UI only. You must set the profile option Geography Address Validation Enabled to Yes for the validation to be enforced during import. Follow these steps to set the profile option:

1. Open the **Manage Administrator Profile Values** task from the implementation project or after searching for the task by name in the Setup and Maintenance work area.

   The Manage Administrator Profile Values page appears.

2. In the **Profile Display Name** field located in the Search: Profile Option region, enter **Geography Address Validation Enabled**.

3. Click **Search**.

4. With the profile option selected in the search results, select **Yes** from the **Profile Value** list.

5. Click **Save and Close**.
8 Configuring Search

Setup Overview

You must enable and configure the two primary ways of searching Oracle Sales Cloud: the global search and the searches in each work area.

The two types of search serve slightly different purposes:

- You use the global search located at the top of the application page to search across objects in the application. For example, a search on a contact name finds all the accounts, opportunities, and leads associated with that contact.

- For a more focused search, you can navigate to the work area of the object you are looking for and search for it there by name or using multiple search criteria.

For more information how to use these two types of search, see the Using Search and Activities chapter of the Using Sales guide.

The two searches use different technology, so the setups you perform for one do not impact the other.

Perform the setups outlined in the following table. Detailed steps are provided in procedures in this chapter. You can open all tasks from the Configure Search folder in your implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Enable work area search by setting up the Synchronize Database Search Indexes for CRM Objects process to run periodically. Oracle recommends that you set the process to run every five minutes.</td>
<td>Synchronize Database Search Indexes for CRM Objects</td>
<td>See the Running the Work Area Search Index Process topic in this chapter.</td>
</tr>
<tr>
<td>Step</td>
<td>Description</td>
<td>Task Name</td>
<td>Where to Get More Details</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
<td>-----------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>2</td>
<td>Set up the process Optimize Database Search Indexes for CRM Objects to run weekly. This process prevents index fragmentation and degradation in search performance for work area searches.</td>
<td>Optimize Database Search Indexes for CRM Objects</td>
<td>See the Optimizing Search Indexes to Speed Up Work Area Searches topic in this chapter.</td>
</tr>
<tr>
<td>3</td>
<td>Enable global search by setting the system profile option FUSION_APPS_SEARCH_ENABLED to Y at the Site level.</td>
<td>Manage Administrator Profile Values</td>
<td>See Enabling the Global Search Profile Option in this chapter.</td>
</tr>
<tr>
<td>4</td>
<td>Deactivate global search on any application objects you do not use. Deactivating objects removes them from the global search UI and preserves system resources. By default, Oracle enables global search for all searchable objects and schedules these objects to be indexed daily on a staggered schedule.</td>
<td>Manage Search View Objects</td>
<td>See Deactivating Search on Application Objects in this chapter.</td>
</tr>
</tbody>
</table>

You can configure global search behavior further by following the procedures described in the Setting Up Search chapter in the Oracle Sales Cloud Implementing Sales guide.

**Running the Work Area Search Index Process**

To enable searches in Oracle Sales Cloud work areas, you must set up the Synchronize Database Search Indexes for CRM Objects process to run periodically. Oracle recommends that you set the process to run every five minutes. Until a new record is indexed, it remains unavailable for searching.

While signed in as a setup user, you can run the Synchronize Database Search Indexes for CRM Objects process from the implementation project or from the Scheduled Processes work area. To run the process, do the following:

1. From the implementation project, open the Synchronize Database Search Indexes task.
2. If you are not using the implementation project, then do the following:
   a. In the Navigator, click Scheduled Processes under the Tools heading.
   
   The Scheduled Processes window appears.
   
   b. Click Schedule New Process.
   
   The Schedule New Process window appears.
   
   c. Enter Synchronize database search in the Name field and press Return.
   
   The window displays the full process name and description of the process.
d. Click **OK**.

3. Click **Advanced** in the Process Details window.

4. In the Schedule tab, select the **Using a schedule** option.

5. Select **Hourly/Minute** from the **Frequency** list.

6. Specify the index to run every five minutes and enter an end date far in the future.

7. Click **Submit**.

8. Close the confirmation window by clicking **OK**.
Optimizing Search Indexes to Speed Up Work Area Searches

Over time, the indexes for the different work area searches and saved searches become fragmented, affecting search performance. Oracle recommends that you run the Optimize Database Search Indexes for CRM Objects process weekly to optimize search performance. This process does not affect global search performance, which uses different indexes. To run the process, do the following:

1. While signed in as a setup user, open the **Optimize CRM Search Indexes for CRM Objects** task from the implementation project. Alternatively, you can run this process using the following steps:
   a. In the Navigator, click **Scheduled Processes** under the **Tools** heading.
      The Schedule Processes window appears.
   b. Click **Schedule New Process**.
      The Schedule New Process window appears.
   c. Make sure the **Job** option is selected.
   d. Enter **optimize database search** in the **Name** field and press **Return**.
      The Schedule New Processes window displays the process name.
   e. In the Schedule New Processes window, click **OK**.
      The Process Details window appears.
2. Click **Advanced**.
3. On the **Schedule** tab, select the **Using a schedule** option.
4. Select a frequency.
5. Enter an end date in the far future.
6. Click **Submit**.

Enabling the Global Search Profile Option

Use this procedure to enable global search by setting the Global Search Enabled profile option:

1. Sign in as a setup user and open the **Manage Administrator Profile Values** task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.
   The Manage Administrator Profile Values page appears.
2. In the Search: Profile Option region, **Profile Option Code** field, enter **FUSION_APPS_SEARCH_ENABLED**.
3. Click **Search**.
   The application displays the profile option information. You can set the FUSION_APPS_SEARCH_ENABLED profile option at the Site level.
4. In the **FUSION_APPS_SEARCH_ENABLED: Profile Values** section, select **Yes** from the **Profile Value** list.
5. Click **Save and Close**.

Tip: You must sign out and sign in again to see the global search box at the top of the page.
Deactivating Global Search on Application Objects

Oracle activates global search on all Oracle Sales Cloud application objects where search is available. Use this procedure to deactivate any objects you are not using to conserve system resources.

To deactivate search on unused objects:

1. While signed in as a setup user open the Manage Search View Objects task from the implementation project. Setup users and sales administrators can also search for the task by name in the Setup and Maintenance work area.

   The Manage Search View Objects page appears.

2. Select each object you want to remove from search and click Deactivate.

3. You must click Refresh to see the updated status.

4. Click Done.
Setup Overview

Before you create sales application users either in the UI or by importing them from a file, you must perform the tasks described in this chapter.

Read the What You Must Do Before Creating Sales Users topic and perform the tasks listed in the following table. Detailed steps are provided in separate procedures.

You can open all tasks for this setup from the Create Sales Users folder in your implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create any additional resource roles you need. Vision Corp. creates the CEO resource role because it wants to start the resource hierarchy at the CEO level and no CEO resource role is provided by Oracle. It also creates the Inside Sales resource role for the inside sales representatives.</td>
<td>Manage Resource Roles</td>
<td>Creating Additional Resource Roles topic in this chapter</td>
</tr>
<tr>
<td>2</td>
<td>Set up provisioning rules to automatically provision the appropriate job roles and abstract roles for the additional resource roles you created.</td>
<td>Manage HCM Role Provisioning Rules</td>
<td>Creating Rules to Automatically Provision Job Roles to Sales Users in this chapter</td>
</tr>
</tbody>
</table>

What You Must Do Before Creating Sales Users

When you create sales application users either in the UI or by importing them you not only provision the permissions the users need to do their jobs, but you also build the organization chart for your sales organization. This means that you must set up not only the provisioning rules, but also the elements that the application uses to create the organization chart in the Resource Directory shown in the following figure.
Oracle Sales Cloud supports matrix management, so the resource hierarchy you build does not have to match the formal reporting hierarchy in the Oracle Global Human Resources Cloud or other human resources application.

All users must have:

- A resource role (callout 1)
  
  You must assign a resource role, a name describing the role each resource plays in the organization, to each sales user you create. Resource roles display right underneath user names in the resource directory and elsewhere in the UI. They are also used as the primary condition in the role provisioning rules.

- A resource organization (callout 2)
You must create a resource organization for every manager. Each individual contributor who is not a manager automatically inherits the manager’s organization. The name of the resource organization need not be any formal department name, but you should avoid using manager names to accommodate hierarchy changes.

The application builds the resource organization hierarchy based on the management hierarchy you specify when you create users. You must enter a manager for each user you create, except for the top of the resource hierarchy.

What Oracle Provides for You

Oracle provides you with the standard sales organization resource roles and the role provisioning rules that automatically assign users with the job roles and abstract roles required to do their job.

The following resource roles supplied by Oracle will trigger the automatic assignment of job and abstract roles:

- Channel Account Manager
- Channel Sales Manager
- Channel Operations Manager
- Contract Administrator
- Contract Manager
- Customer Data Steward
- Data Steward Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Salesperson
- Sales Restricted User
- Sales Setup User
- Sales Vice President

Note: For each of the resource roles provided by Oracle, there is a corresponding job role with the same name except for Salesperson. The job role corresponding to the Salesperson resource role is Sales Representative.
For example, when you create a user as an employee with the Sales Manager resource role provided by Oracle (callout 1) shown in the following figure, the application automatically provisions the Sales Manager job role and the Resource abstract role. Because you are creating the user as an employee, the application also provisions the Employee abstract role.

The following table lists the role-provisioning rules provided by Oracle, the condition which triggers the provisioning, and the job and abstract roles the rule provisions. You can obtain a description of each job and abstract role from the Oracle Sales Cloud Security Reference guide.

**Note:** If you are setting up Oracle Sales Cloud in a Global Single Instance environment, then Oracle does not provide these role-provisioning rules for you. You must create them manually.

<table>
<thead>
<tr>
<th>Provisioning Rule Name</th>
<th>Condition</th>
<th>Job or Abstract Roles Provisioned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Channel Account Manager</td>
<td>HR Assignment Status is Active&lt;br&gt;Resource Role is Channel Account Manager</td>
<td>Channel Account Manager&lt;br&gt;Resource</td>
</tr>
<tr>
<td>Channel Sales Manager</td>
<td>HR Assignment Status is Active&lt;br&gt;Resource Role is Channel Sales Manager</td>
<td>Channel Sales Manager&lt;br&gt;Resource</td>
</tr>
<tr>
<td>Channel Operations Manager</td>
<td>HR Assignment Status is Active&lt;br&gt;Resource Role is Channel Operations Manager</td>
<td>Channel Operations Manager&lt;br&gt;Resource</td>
</tr>
<tr>
<td>Contract Administrator</td>
<td>HR Assignment Status is Active</td>
<td>Contract Administrator</td>
</tr>
<tr>
<td>Provisioning Rule Name</td>
<td>Condition</td>
<td>Job or Abstract Roles Provisioned</td>
</tr>
<tr>
<td>---------------------------------</td>
<td>----------------------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Contract Manager</td>
<td>HR Assignment Status is Active</td>
<td>Contract Manager</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Contract Manager</td>
<td>Resource</td>
</tr>
<tr>
<td>Customer Data Steward</td>
<td>HR Assignment Status is Active</td>
<td>Customer Data Steward</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Customer Data Steward</td>
<td>Resource</td>
</tr>
<tr>
<td>Data Steward Manager</td>
<td>HR Assignment Status is Active</td>
<td>Data Steward Manager</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Data Steward Manager</td>
<td>Resource</td>
</tr>
<tr>
<td>Partner Administrator</td>
<td>Resource Role is Partner Administrator</td>
<td>Partner Administrator</td>
</tr>
<tr>
<td>Partner Sales Manager</td>
<td>Resource Role is Partner Sales Manager</td>
<td>Partner Sales Manager</td>
</tr>
<tr>
<td>Partner Sales Representative</td>
<td>Resource Role is Partner Salesperson</td>
<td>Partner Sales Representative</td>
</tr>
<tr>
<td>Sales Administrator</td>
<td>HR Assignment Status is Active</td>
<td>Sales Administrator</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Sales Administrator</td>
<td>Resource</td>
</tr>
<tr>
<td>Sales Lead Qualifier</td>
<td>HR Assignment Status is Active</td>
<td>Sales Lead Qualifier</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Sales Lead Qualifier</td>
<td>Resource</td>
</tr>
<tr>
<td>Sales Manager</td>
<td>HR Assignment Status is Active</td>
<td>Sales Manager</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Sales Manager</td>
<td>Resource</td>
</tr>
<tr>
<td>Sales Representative</td>
<td>HR Assignment Status is Active</td>
<td>Sales Representative</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Salesperson</td>
<td>Resource</td>
</tr>
<tr>
<td>Sales Vice President</td>
<td>HR Assignment Status is Active</td>
<td>Sales Vice President</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Sales Vice President</td>
<td>Resource</td>
</tr>
<tr>
<td>Contingent Worker</td>
<td>HR Assignment Status is Active</td>
<td>Contingent Worker</td>
</tr>
<tr>
<td></td>
<td>System Person Type is Contingent Worker</td>
<td>Contingent Worker</td>
</tr>
<tr>
<td>Employee</td>
<td>HR Assignment Status is Active</td>
<td>Employee</td>
</tr>
<tr>
<td></td>
<td>System Person Type is Employee</td>
<td>Employee</td>
</tr>
</tbody>
</table>
Creating Additional Resource Roles and Provisioning Rules

You must create additional resource roles using the Manage Resource Roles task from the Setup and Maintenance work area if:

- You want other job titles to display for your users.
  
  For example, you must create a CEO resource role if you want to include the CEO title in your organization chart. It’s not one of the resource roles created for you.
- You want to provision some users with special privileges.
  
  For example, if you want to have one of the sales managers in your organization perform the sales administration role in addition to the sales manager role, then you must create a new resource role to assign those roles.
- You want to create a sales administrator who is a manager.
  
  The Sales Administrator resource role provided by Oracle is intended for an individual contributor (member).

If you create a new resource role, then you must also create a new role provisioning rule. For example, if you created a CEO resource role, then you must create a role provisioning rule to provide that CEO with one or more of the available job roles and the Resource abstract role.

Creating Additional Resource Roles

This topic describes how to create additional resource roles. After you create a resource role, you must create the appropriate provisioning rules to provision the user with the required job and abstract roles. The resource role by itself is only a title.

Creating a Resource Role

1. Sign in as a setup user and open the Manage Resource Roles task from the implementation project or after searching for the task by name in the Setup and Maintenance work area.

   The Manage Resource Roles page appears.
2. If you want to review all the existing resource roles to verify that it is necessary to create a new role, then click Search without entering search criteria.

   All the available resource roles are listed. Roles that are predefined by Oracle are labeled System.
3. Click Create to create a new resource role.
The Create Role page appears.

4. In the **Role Name** field, enter the name of the resource role as it will appear in the application UI, for example, **Chief Executive Officer**.

5. In the **Role Code** field, enter a unique internal name, such as **CEO**. No spaces are permitted. If you are importing users from a file, then you must include this code in your file rather than the name.

6. Select the **Manager** option, if the resource role belongs to a manager, or the **Member** option, if the resource role belongs to an individual contributor.

7. From the **Role Type** list, select **Sales** to classify the role that you are creating.

8. Click **Save and Close**.

Creating Rules to Automatically Provision Job Roles to Sales Users

You must create role provisioning rules for any new resource roles you created, such as the CEO or Inside Sales. For the CEO, Inside Sales, and all other internal sales users, including sales administrators, you must add the Resource abstract role in addition to the required job roles. The Resource abstract role permits the users to access the Resource Directory. Do not add the Resource abstract role for partner roles.
Creating a Provisioning Rule

1. Sign in as a setup user and open the task Manage HCM Role Provisioning Rules from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.

   The Manage Role Mappings page appears.

2. Click Create.

   The Create Role Mapping page appears.

3. In the Mapping Name field, enter a name that will help you identify the mapping, for example, CEO or Inside Sales Representative.

4. In the Conditions region, enter the two conditions listed in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Role</td>
<td>Select the resource role you want to provision, for example, Chief Executive Officer or Inside Sales Representative.</td>
</tr>
<tr>
<td>HR Assignment Status</td>
<td>Select Active. This additional condition ensures that the provisioned roles are automatically removed if the user is terminated in Global Human Resources.</td>
</tr>
</tbody>
</table>

5. In the Associated Roles region, click Add to add the job roles you want to provision.

   For the CEO, add the Sales VP job role. For the inside sales representative, add the Sales Representative job role.

6. For all internal sales users, including the CEO and inside sales, add the Resource abstract role. Do not add this role for partner roles.

7. Make sure the Autoprovision option is selected for all the roles.

8. Click Save and Close.
Chapter 10

Creating Sales Users in the UI

Setup Overview

After you have set up any additional resource roles and role-provisioning rules, you are ready to create sales users in the UI. Because you must specify the manager for each user you create, start creating users from the top of the corporate hierarchy and work your way down. Oracle recommends that you start at the very top of the corporate hierarchy, so you can easily add additional branches in the future.

The following table lists the steps to follow when creating sales users. You can open these tasks from the Create Sales Users folder in the implementation project. Alternatively, you can search for the tasks by name in the Setup and Maintenance work area. The Manage Users work area, where you create the user records, is also available on the Navigator.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Before you create users, review your user notifications and preferences setup. When you are create the CEO and top company officers as users, you do not want to accidentally spam them with password notifications.</td>
<td>Manage Applications Security Preferences</td>
<td>See the Setting Up User Account Preferences chapter in this guide.</td>
</tr>
<tr>
<td>2</td>
<td>Create the CEO or another top user in the hierarchy and his or her resource organization. The resource organization you create automatically becomes the top organization in the hierarchy. You do not enter a manager for this user.</td>
<td>Manage Users</td>
<td>See the Creating Sales Users in the UI topic in this chapter.</td>
</tr>
<tr>
<td>3</td>
<td>Create the rest of the users, starting right below the top of the hierarchy. Work your way down because you must select the manager for every user you create. When you create a manager user, you must also create his or her resource organization. Users who are not managers inherit the resource organization of their managers.</td>
<td>Manage Users</td>
<td>The same Creating Sales Users in the UI topic.</td>
</tr>
<tr>
<td>4</td>
<td>If you are using some of these users for testing your setups, then you must manually reset their passwords in the Security Console work area.</td>
<td>Manage Applications Security Preferences</td>
<td>See the Setting Up User Account Preferences chapter in this guide.</td>
</tr>
</tbody>
</table>
Step | Description | Task Name | Where to Get More Details
--- | --- | --- | ---
| | Make sure that you have turned off notifications for password resets, unless you want the user to be notified that you manually reset the password. | | |

After creating the first few users in the top of your hierarchy, you can import the rest as described in the next chapter.

Related Topics

- Managing Users chapter in the Securing Oracle Sales Cloud guide

About Creating the Vision Corp. Sales Organization Hierarchy

Although Vision Corp.’s pilot implementation is limited to the US sales organization only, Vision Corp. starts the organization hierarchy at the CEO. Starting with the CEO makes it easy to add other branches of the organization in the future.
The following figure shows the Vision Corp. sales organization for the pilot implementation.

**Created in UI**

- William Taylor
  - CEO Vision Corp.

- Peter Apt
  - Vice President
  - Global: High Tech

**Imported**

- Bob Boyle
  - Sales Vice President
  - US Direct Sales

- Martin Conway
  - Sales Vice President
  - US Product Sales

- John Dunbar
  - Sales Administrator

- Henry Emman
  - Inside Sales
  - US Products - Central

- Hiroshi Sato
  - Inside Sales
  - US Products - Central

- Alex Smith
  - Sales Manager
  - US Products - Central

- Peter Branch
  - Salesperson
  - US Products - Central

- Marilyn Richie
  - Salesperson
  - US Products - Central

- Mateo Lopez
  - Sales Manager
  - US Products - West

- Michael Rhodes
  - Sales Manager
  - US Products - East

- Lisa Jones
  - Salesperson
  - US Products - West

- Julian Henderson
  - Salesperson
  - US Products - West

- Kristen Garrity
  - Salesperson
  - US Products - East

- Sean Goodkin
  - Salesperson
  - US Products - East

Vision Corp. creates the first two users in the UI: William Taylor, CEO, and Peter Apt, the Vice President of Global - High Tech. You must create the first user at the top of the hierarchy. Creating users in the UI also makes it possible to check if the provisioning rules work correctly. Vision imports the rest of the users as described in the next chapter.

Make sure that you obtain the sign-in information for a representative sample of users, so that you can use those users for testing. For example, to test opportunity assignment and forecasting, you will want to sign in as a salesperson and manager in each sales organization: US Products - West, US Products - Central, and US Products - East. To test forecasting and quotas, you must sign in as the sales administrator.
Creating Sales Users in the UI

Video

Watch: This tutorial shows you how to create a sales user in the UI. The content of this video is also covered in text topics.

Procedure

Use the following procedure to create sales users in the UI. Note that the procedure is slightly different for managers and individual contributors:

- You must assign each manager with his or her own resource organization. You can create the resource organization while creating the manager.
- Each individual contributor automatically inherits her manager’s resource organization.

The application determines who is a manager from the resource role you assign to the user.

To create a user, do the following:

1. While signed in as a setup user, open the **Manage Users** task from the implementation project. You can also open this task by clicking **Manage Users** under the **My Team** heading in the Navigator, or you can search for the task by name in the Setup and Maintenance work area.
2. On the Manage Users (or Search Person) page, click **Create**.
   
   The Create User page appears.
3. Enter the user’s name and a unique e-mail address in the Personal Details region.

   The application sends all notifications regarding password changes to this e-mail address unless you turn off notifications in the Security Console work area.

   **Tip:** To ensure that the user is never notified by e-mail, you can change the domain of the e-mail addresses to any of the special discard e-mail domains provided by Oracle for this purpose. For example, you can substitute @discard.mail.us1.cloud.oracle.com. See the Using Test E-Mail Accounts During User Setup topic in the Implementing Sales guide for details.

4. The application prepopulates today's date in the **Hire Date** field and uses that date as the start date for the resource.

   If you are planning to use quotas, then you must make sure that the hire date is a date before the start of the first quota period. For example, if you are allocating monthly quotas for fiscal year July 01, 2015 to June 30, 2016, then you must enter a hire date of **7-1-2015** or earlier. You cannot change the hire date after you create the user.
5. In the User Details region, enter the user name.
If you leave the **User Name** field blank, then the application automatically creates a user name for you. By default, the application uses the e-mail as the user name. You can select other default user name formats, such as first name initial and last name, on the Administration tab in the Security Console work area.

6. Deselect the **Send user name and password** option in the User Notification Preferences region unless you want the user to receive the URL for the initial sign-in.

If you leave this option selected and you did not turn off notifications in the Security Console, then the application sends the e-mail notification immediately after you save the user record for the first time. This option is available only before you save. After you save the record, you must instead use the Users tab in the Security Console work area to reset the password and send the notification as described in a related topic.

7. Make the following entries in the Employment Information region:

   a. Select **Employee** from the **Person Type** list.
   b. From the **Legal Employer** list, select the legal employer Oracle created for you using the information you provided when you signed up with Oracle Sales Cloud. There should be only one value available: your company name followed by the suffix LE.
   c. From the **Business Unit** list, select the business unit created for you when you signed up. There should be only one value available: your company name followed by the suffix BU.

   Neither the legal employer name nor the business unit name is visible in the sales application, so the names need not correspond to actual entities in your company.

   ![Note:](image)

   The remaining fields in the Employment Information region are not used by Oracle Sales Cloud. These fields include: Job, Grade, Department, Location, Mail Stop, and Manager.

8. Make the following entries in the Resource Information region:

   a. From the **Resource Role** list, select the role the user plays in the resource organization.

   For example, for the CEO, select CEO, the resource role you created.

   b. From the **Reporting Manager** list, select the user’s manager. For the top user in your hierarchy, such as the CEO, leave this field blank.

   c. If the user you are creating is a manager, then create the resource organization as follows:

      i. Click **Organization** and the **Create** link in the list.
The following figure shows a screen capture of the Resource Information region highlighting the location of the Create link at the end of the Organization list.

**Resource Information**

- **Resource Role**: Chief Executive Officer
- **Reporting Manager**: (Blank)
- **Organization**: (Blank)

**Roles**

- **Create**

The Create Organization window appears.

1. Enter the organization name.
2. Make sure the Sales option is selected and click OK.
3. If the user you are creating is a not a manager then the resource organization is automatically copied from the manager.

9. Click Autoprovision Roles.

The application provisions the job and abstract roles according to the role provisioning rules.

10. Click Save and Close.

The application creates the user. If you selected the Send User Name and Password option, then the application also sends the e-mail with the URL the user can use to sign in to the application for the first time.
Resetting User Passwords

Setup users, who are provisioned with the IT Security Manager job role, can use the Users tab in the Security Console work area to reset passwords for all application users. Users who cannot access the Security Console can reset only their own passwords using the Set Preferences link in the Settings and Actions menu available by clicking their user name in the application or by using the Forgot Password link on the sign-in page.

Note: Use the Security Console only for changing passwords and for updating user account information such as user first and last name, e-mail address, and status. To manage users, use the Manage Users work area.

To reset a user’s password in the Security Console, do the following:

1. From the implementation project, open the Manage Applications Security Preferences task. Alternatively, you can search for this task by name in the Setup and Maintenance work area or use the Navigator.

   You can close any warnings regarding the scheduling of the Import Users and Roles Application Security Data job.

2. Click the User Accounts tab.

3. Search for the user using one of the following:
   - First or last name, but not both
   - User name

   The following figure shows a screen capture of the User Accounts tab in the Security Console work area. Callout 1 highlights the location of the Action menu.

4. From the Action menu, select Reset Password.
The Reset Password window appears, shown in the following figure. The window displays the password strength policy, which is set on the Security Console Administration tab.

5. If you want the application to send an e-mail to users with a URL that they can use to create their own passwords, then select the **Automatically generate password** option.

6. To reset the password yourself, do the following:

   a. Select the **Manually change the password** option
   b. Enter the new password twice.

   **Note:** The option to reset a password to an automatically generated value is always available. For the manual-reset option, you must select the **Administrator can manually reset password** option on the Security Console **Administration** tab.

7. Click **Reset Password**.
Importing Users Overview

After you create a couple of users in the UI to test your setup, you are ready to import the rest of the users using the Excel macro provided by Oracle. The import creates the resource organizations for each manager, creates the sales organization hierarchy, and provisions the users with the job roles and abstract roles they need.

The following table provides an overview of the setup steps for importing users using the R12 Sales User Quick Import Macro, which you can download from document 2229503.1 on My Oracle Support. The task name column lists the tasks that you can open either from the implementation project or from the Setup and Maintenance work area. For detailed steps refer to the procedures listed in the Where to Get More Details column.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>As a prerequisite, you must obtain the names of the business unit and the legal entity as they appear in the application. You can obtain the business unit and legal entity names from the page you use to create users in the Manage Users work area.</td>
<td>Manage Users</td>
<td>See the Obtaining the Names of the Business Unit and Legal Entity topic in this chapter.</td>
</tr>
<tr>
<td>2</td>
<td>Sign in to support.oracle.com and download the R12 Sales User Quick Import Macro from article Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1). In the macro, enter the business unit, legal entity, and download any additional resource roles you created on the Role Details worksheet.</td>
<td>None.</td>
<td>See the Downloading and Using the User Macro topic in this chapter and the accompanying video.</td>
</tr>
<tr>
<td>3</td>
<td>Enter user information starting from the top of the user hierarchy and click Create Import Activity to import.</td>
<td>None.</td>
<td>See Downloading and Using the User Import Macro topic in this chapter. For details on the values in your file, see the Understanding the User Import Template topic in this chapter.</td>
</tr>
<tr>
<td>4</td>
<td>In the Security Console work area reset the password for a user you want to use for testing.</td>
<td>Manage Application Security Preferences</td>
<td>See the Resetting User Passwords topic in the Creating Setup Users chapter.</td>
</tr>
</tbody>
</table>
### Obtaining the Names of the Business Unit and Legal Entity

You can obtain the names of the business unit and legal entity from the Create Users page using the following steps:

1. Sign in as a setup user.
2. Open the task **Manage Users** from the implementation project or searching for the task by name in the Setup and Maintenance work area.
3. Click **Create**.
   
   The Create User page appears.
4. In the Employment Information region, select **Employee** as the **Person Type**.
5. You can obtain the business unit and legal entity values for your file from the **Business Unit** and **Legal Entity** lists.

   ![Employment Information](image)

6. Click **Cancel**.

### Downloading and Using the User Import Macro
Download the Macro for Importing Users

To import users, you must first download the following file:

<table>
<thead>
<tr>
<th>File Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>R12 Sales User Quick Import</td>
<td>An Excel macro where you enter the users you want to import</td>
</tr>
<tr>
<td>Macro.xlsm</td>
<td></td>
</tr>
</tbody>
</table>

The file is available on My Oracle Support, in article Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1).

Follow these steps to download the macro:

1. Sign in to support.oracle.com.
2. Search for 2229503.1.
3. Scroll down in the article to the Details region and click Sales User Import Macro in the Excel Macro Files column to download the Excel macro file from the table.
4. Save the macro file to a folder on your computer.
   - The application saves import logs to this folder.

Entering Data into the Sales User Import Macro and Importing

Follow these steps to enter data into the R12 Sales User Quick Import Macro.xlsm and perform the import.

Before entering data into the macro, confirm that you have this information:

- Legal entity name (usually your company name followed by LE)
- Business unit name (usually your company name followed by BU)
- The e-mail and resource organization name for the resource who is the manager of the first person or persons you are importing.
  - The manager’s e-mail and resource organization name form the link between the resources you created in the UI and those you are about to import.

\textbf{Note:} You can extend the macro to import additional standard and custom fields. If you do, then you must create a new mapping to use in your import. The steps for customizing macros are not covered in this guide.

Once you have all required information, you can enter the user data into the macro:

1. Open the R12 Sales User Quick Import Macro.xlsm file you downloaded earlier.
If you have not enabled macros, then Microsoft Excel warns you that macros have been disabled. In this case:

a. Click **Options**.

The Microsoft Office Security Options window appears.

b. Select the **Enable this content** option and click **OK**.

2. Navigate to the Role Details worksheet. The standard sales roles are listed:

   - Sales Administrator
   - Sales Manager
   - Sales Vice President
   - Salesperson

   The following figure shows a screen capture of the Role Details worksheet with the standard roles.

   ![Role Details worksheet](image)

<table>
<thead>
<tr>
<th>Role Code</th>
<th>Role Name</th>
<th>Manager</th>
</tr>
</thead>
<tbody>
<tr>
<td>SALES_ADMINISTRATOR</td>
<td>Sales Administrator</td>
<td>NO</td>
</tr>
<tr>
<td>SALES_MANAGER</td>
<td>Sales Manager</td>
<td>YES</td>
</tr>
<tr>
<td>SALES_VP</td>
<td>Sales Vice President</td>
<td>YES</td>
</tr>
<tr>
<td>SALES_REPRESENTATIVE</td>
<td>Salesperson</td>
<td>NO</td>
</tr>
</tbody>
</table>

3. If you created additional resource roles, click **Populate Roles from Server** and enter the following details in the Login window:

   - Host information for your environment.

     The host name is the portion of the URL of your environment between `https://` and the next forward slash, `/sales`. You can obtain the correct host name by signing in and navigating to the Accounts work area, for example. The host name contains the term `crm`.

   - Your user name
   - Your password

   **Note:** Do not copy the host name from your application sign-in page because the URL is different.
The following figure shows a screen capture of the Login window with sample host information for a test environment.

4. Click **Submit**.

The macro retrieves the roles you set up from your environment and enters them into the worksheet so they are available as the list of values in the Resource Role column in the Template worksheet.

5. Navigate to the Template worksheet.

6. In the fields at the top of the sheet, enter your legal entity and business unit.

The following figure shows a screen capture of the top of the worksheet with sample data.

In this same region, the **Mapping** field is already set to **Default**. The application uses the standard mapping for importing employee resources. If you added additional columns to the macro to import standard or custom fields, then you would have to enter a mapping number of a custom mapping. Customizing the macro is not covered in this guide.

7. Enter the sales users that you want to import, working your way down the sales hierarchy. You must start at the top because you must enter a manager for each user you import. You can import up to 200 users at a time.

For each person, enter the following details:
### Importing Users

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Enter the first name as you want it to appear in the sales application.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Enter the last name as you want it to appear in the sales application.</td>
</tr>
<tr>
<td>E-mail</td>
<td>You must enter a unique e-mail address.</td>
</tr>
<tr>
<td>Manager’s E-mail</td>
<td>Enter the manager’s e-mail address. The application uses this address to build the management hierarchy.</td>
</tr>
<tr>
<td>Resource Role</td>
<td>From the list, select the resource role code for the resource role that you are assigning to the user.</td>
</tr>
<tr>
<td></td>
<td>The internal codes for the sales resource roles provided by Oracle include:</td>
</tr>
<tr>
<td></td>
<td>◦ SALES_VP</td>
</tr>
<tr>
<td></td>
<td>◦ SALES_MANAGER</td>
</tr>
<tr>
<td></td>
<td>◦ SALES_REPRESENTATIVE</td>
</tr>
<tr>
<td></td>
<td>◦ SALES_ADMINISTRATOR</td>
</tr>
<tr>
<td>Organization Name</td>
<td>For each manager, enter his or her resource organization. This field is disabled for individual contributors because they inherit the organizations of their managers.</td>
</tr>
<tr>
<td></td>
<td>The organization names you enter here appear in the Resource Directory and elsewhere in the UI.</td>
</tr>
<tr>
<td>Manager Organization Name</td>
<td>Enter the organization name of the user’s manager. You must make this entry both for managers and individual contributors. You must enter the names exactly without additional spaces and with the correct capitalization. If the manager is one of the users in your macro, then the macro makes this entry for you.</td>
</tr>
</tbody>
</table>

The macro provides some validations and defaults as you make your entries. For example:

- You receive an error if you enter a malformed e-mail or if you enter an e-mail of a nonmanager in the Manager’s E-Mail field.
- Entering a manager’s e-mail automatically populates the manager’s organization.

8. When you are done with your entries, click **Create Import Activity**.
9. If the **You must correct errors in your entries** message appears, then:
   a. Click **OK**
      
      The Error worksheet displays your errors.
   b. Click each error link in column D and make the correction on the Template worksheet.

   **Note:** After you correct an error, you must click outside the field for the correction to be recognized.
   c. Click **Create Import Activity** again.
10. On the Login page, enter the host, user name, and password if required.
If you previously entered these details on the Role Details worksheet when retrieving roles from the server, then the same values appear here.

11. Click **Submit**.

The application displays one of the messages listed in the following table:

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted</td>
<td>Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>successfully.</td>
<td></td>
</tr>
<tr>
<td>Unable to connect to the server at this</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>time.</td>
<td></td>
</tr>
<tr>
<td>Unable to submit the file import activity.</td>
<td>You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors work sheet to view the error details.</td>
</tr>
<tr>
<td>Check log for details.</td>
<td></td>
</tr>
</tbody>
</table>

12. If your import activity was submitted successfully, then click **Activity Details** to monitor the progress of the file import activity directly from the macro.

The Activity Details window appears, listing the import activity name, its ID, and its status. The following figure shows the window.

![Activity Details Window](image)

The import may take a few minutes to complete.

- If the import activity is still in progress, then you can refresh the status periodically by clicking **Refresh**.
- If your import completed successfully, then the status listed is **Completed**.

13. If the import activity completes with errors, then do the following:

   a. Click **Generate Log** to display the error message on the macro's Errors worksheet.
The following figure a portion of the Errors worksheet.

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Sheet</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>The parent organization is invalid because it does not match the organization of the specified manager. (HZ-120513) Details: You must either specify a parent organization that matches the organization of the specified manager or leave the Parent Organization field blank to derive the parent organization from the manager value.</td>
<td>Template</td>
<td>A11</td>
</tr>
</tbody>
</table>

b. Click the value in the Location column to navigate to the erroneous record, correct the issue, and resubmit the import job.

14. After the import is completed, optionally click **Generate Log** to save a file that lists the imported sales users.

The file is saved to the destination folder where you saved the macro. The file path is displayed in a message.

15. Save the macro file with your data for updates at a later time. You can use the macro to make both minor updates such as misspelling of names or to change the sales hierarchy.

16. Now that you have completed creating users, verify the import.

   - Navigate to the Manage Users page to verify that your individual users were correctly created with the appropriate resource role and application job roles.
   - You can also verify the user hierarchy in the Resource Directory.
   - See the Reviewing the User Hierarchy You Created topic for details.

### Reviewing the Resource Hierarchy You Created

Now that you have completed creating users, you can verify the resource hierarchy in the Resource Directory. You can make changes to the user name and other details by editing the user record from the Manage User work area or you can make the corrections in the Excel macro and import again.

#### Verifying the Resource Hierarchy

To review the resource hierarchy, do the following

1. Sign in as one of the sales users you created.
2. Click **Resource Directory** in the Navigator.

   The Resource Directory page appears.
3. Search for the top user by first name using the Search: Resources panel on the left of the page.
4. Click the user name link in the Search Results.

   The application displays the detailed user information in the Resource page. From the Resource page, you can take one of the actions described in the following table. The callout numbers refer to the figure that follows the table.
### Callout Numbers

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>View a graphical display of the organization hierarchy for the user.</td>
</tr>
<tr>
<td>2</td>
<td>Upload a portrait of the user.</td>
</tr>
<tr>
<td>3</td>
<td>Review the job and abstract roles provisioned to the user on the Roles tab (Current Roles list).</td>
</tr>
</tbody>
</table>

The following figure shows a screen capture of the Resource page highlighting the locations of the different actions.

5. To view a graphical representation of your organization hierarchy, click **Show Reporting Hierarchy**.

The application displays the user and their manager in an expandable hierarchy.
The following figure shows a screen capture of the visual representation of the sample reporting hierarchy.

6. You can view additional levels of the reporting hierarchy by clicking the arrows below or above each user box. Navigation tools on the top left of the page make it possible to zoom in and out.

Correcting User Records

Follow this procedure to edit individual records. You can change the user name, fix spelling errors, and make other changes. Alternatively, you can perform these same edits in the Excel macro and import again.

1. Sign in as a setup user.
2. Navigate to the Manage Users work area.
3. In the Keywords search field, enter the first name of the user.
4. Click Search (the right arrow icon).
5. Click the name link in Search Results.
6. The application displays the user record in the Edit User page.
7. In the Edit User page, you can edit the information about each user. For example, you can:
   a. Fix spelling errors
   b. Change the user name
   c. Change the resource roles and provisioning of job roles
8. Click Save and Close when you are done.
How can I update the sales organization hierarchy?

If the sales organization changes, because of a reorganization, for example, or if you must correct a mistake, then you should make your corrections in the user import Excel macro or in the import file you used for your initial import and import again. Importing your corrections takes care of many steps that you would have to perform manually in the Manage Resources UI. For example, if a sales representative gets promoted to a manager, then the import automatically end-dates her Sales Representative job role, assigns her the Sales Manager resource role, and automatically provisions her the Sales Manager job role. If a manager moves to a different organization, then her reports are automatically assigned to her manager.

See the Securing Sales guide for more details.
12 Setting Up the Sales Catalog

Sales Catalog Setup Overview

You must create a catalog of the products and services your company sells. Your sales agents select from this catalog when entering products in opportunities and leads. In Oracle Sales Cloud, the sales catalog is represented as a hierarchy of product groups with individual products.

Read the About the Sales Catalog topic to learn about the sales catalog and the Vision Corp. use case and perform the setups outlined in the following table. The table lists the steps in the recommended order, provides a description of each step, and lists the names of the tasks you can open from the implementation project for each step. You can open all tasks from the Create Sales Catalog folder in your implementation project. For more details and procedures on each task, see the topics referenced in the last column.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>You can set up the product groups in your sales catalog using the UI and by importing them using the product group import macro, as described in the Importing Products and Product Groups section. This guide shows you how to create the product group at the top of your sales catalog, called the root product group, in the UI. Using the UI to create the root is optional. You can import the entire hierarchy, including the root, using the macro. If you are creating the root product group in the UI, then, after you create the root product group, you must record its reference number. You need the reference number to link the imported product groups.</td>
<td>Manage Product Groups</td>
<td>See the Creating the Root Product Group topic in this chapter.</td>
</tr>
<tr>
<td>2</td>
<td>Perform the following prerequisite setups for products:</td>
<td>Manage Units of Measure, Manage Locations, Manage Item Organizations, Manage Administrator Profile Values, Manage Spoke Systems</td>
<td>See the Prerequisite Setups for Products section in this chapter.</td>
</tr>
<tr>
<td></td>
<td>1. Create the units of measure using the Manage Units of Measures task.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>2. Create a location using the Manage Locations task.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>3. Create the item master organization using the Manage Item Organizations task.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Setting Up the Sales Catalog

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Specify the item master organization you created in system profile Sales Products Item Organization.</td>
<td>In your browser, navigate to support.oracle.com and search for the document.</td>
<td>See the Downloading the Macros for Importing Products and Product Groups topic in this chapter.</td>
</tr>
<tr>
<td>5.</td>
<td>Identify the item master organization as the default organization for import using the Manage Spoke Systems task.</td>
<td>You carry out this task in the Excel macro.</td>
<td>See the Entering Data into the Product Import Macro and Importing topic in this chapter.</td>
</tr>
</tbody>
</table>

Only the units of measure are displayed in Oracle Sales Cloud. They indicate the different units of products you are selling.

The other setup tasks are required only because Oracle Sales Cloud uses Oracle Fusion Product Model to store your products.

| 3    | Download the two Excel macros you will use to import products and product groups from My Oracle Support (Doc ID 2229503.1). | In your application, navigate to the Products work area and search for each product you want to edit. | See the Importing the Product Group Data File topic in this chapter. |
| 4    | Enter product information in the product import macro and import the products. | You carry out this task in the Excel macro. | See the Entering Data into the Product Import Macro and Importing topic in this chapter. |
| 5    | If you want to add images to the products, then you must upload them manually for each product using the Edit Product UI. | You carry out this task in the Excel macro. | See the Entering Data into the Product Group Import Macro and Importing topic in this chapter. |
| 6    | Enter the product group hierarchy and the relationship between the products and the product groups into the product group import macro and initiate your import. | Manage Product Groups | See the Publishing the Sales Catalog topic in this chapter. |
| 7    | Validate the sales catalog on the Manage Product Groups page. | Manage Product Groups | See the Viewing the Product Group Hierarchy topic in this chapter. |
| 8    | If you created all of your product groups in the UI and did not import any, then you must manually publish the sales catalog. If you imported, then you can skip this step because the import process automatically publishes for you. | Manage Product Groups | See the Publishing the Sales Catalog topic in this chapter. |
## About the Sales Catalog

You must create a sales catalog that salespeople use to enter products or product groups the customer is interested in purchasing into opportunities. The sales catalog consists of a hierarchy of product groups, which classifies and organizes the products in your catalog. Optionally, the product groups can include the products you are selling. Each product or product group can include a description and you can add one image for each product. Salespeople can either browse or search the sales catalog to enter the customer product interest in opportunity revenue lines or leads.

You can use product groups as a dimension in your sales territories and for forecasting product revenue. During forecasting setup, you can specify the number of levels in your sales catalog product group hierarchy you want to forecast. For example, Vision Corp. assigns specialists to help close deals on opportunities with the line of green servers the company has just launched.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>You must enable the sales catalog for use by selecting the root node as the &quot;base usage&quot;. This step tells the application which product groups to display in the sales catalog. Each time you make a new assignment of &quot;base usage&quot; to a root product group, you must also run the scheduled process Refresh Denormalized Product Catalog Table for BI. If you do not run the process, then your sales catalog does not appear in the Products territory dimension and you cannot create territories using products. Other applications and reports that use products may be affected as well.</td>
<td>Manage Product Group Usage&lt;br&gt;Refresh Denormalized Product Catalog Table for BI</td>
<td>See the Making a Sales Catalog Available for Use topic in this chapter.</td>
</tr>
<tr>
<td>10</td>
<td>Enable browsing of the sales catalog while editing opportunities by setting the system profile option Browse Sales Catalog in Opportunities Enabled (MOQ_ENABLE_BROWSE_CATALOG) to Yes.</td>
<td>Manage Opportunity Profile Options</td>
<td>See the Enabling Sales Catalog Browsing in Opportunities topic in this chapter.</td>
</tr>
<tr>
<td>11</td>
<td>Sign in as a sales user and validate that your sales catalog shows up in opportunities.</td>
<td>This task is not available in the implementation project. You must Navigate to the Opportunity work area and create an opportunity.</td>
<td>See the Validating the Sales Catalog in the Application topic in this chapter</td>
</tr>
</tbody>
</table>
The following figure shows a screen capture of the Browse page, which salespeople get as they browse the catalog. The figure highlights the product group hierarchy in the Browse section (callout 1) and the products with descriptions in the Products section (callout 2).

Salespeople can drill down into the individual product pages to view the product description and an image. The following figure shows a screen capture of the Product Detail page for a sample product consisting of the product name, description, and image. The Details and Specifications tab and the rest of the tabs at the bottom of the page are not used in Oracle Sales Cloud.
Products in the Sales Catalog

While you can create a sales catalog with product groups only, you must create products to take advantage of advanced Oracle Sales Cloud features such as price books. You must also use products to enable integrations with other Oracle cloud services, including Oracle Engagement Cloud and Oracle Configure, Price, and Quote Cloud. You can use Application Composer to add fields and perform other modifications to products, a feature not available on product groups.

Products you create in Oracle Sales Cloud are also stored in the Oracle Fusion Product Model, which serves as the master item repository for all front-office cloud services. So, the product you create in Oracle Sales Cloud can be priced and quoted in Oracle Configure, Price, and Quote Cloud and serviced in Oracle Engagement Cloud.

The Oracle Fusion Product Model, which is provided free of charge with the different cloud services, provides basic functionality for use in the front-office cloud services. If you are implementing supply chain cloud services or ERP cloud services together with Oracle Sales Cloud, then you must license the Oracle Product Hub Cloud Service and set up your items using the UIs and import features of Oracle Product Hub Cloud. You cannot use Oracle Sales Cloud to create products with enough detail that would make them suitable for back-office supply chain applications. Sales applications do not need to track the physical locations of the items you are selling or shipping, for example, so all products you create in Oracle Sales Cloud are created at the Item Master Organization level in the Oracle Fusion Product Model. Only the Oracle Product Hub Cloud includes the ability to manage item classes. All Oracle Sales Cloud products are created at the default item class and use the Production design phase.

The following figure outlines the role products play in Oracle Sales Cloud and related cloud services:

- In Oracle Sales Cloud, you can create the products for your sales catalog either individually in the UI (indicated by callout 4 in the figure) or you import products from a file (callout 5).
- The products are created both in the Oracle Sales Cloud and in the Oracle Fusion Product Model (callout 7).
- You expose the products in the sales catalog (callout 3) by associating them with product groups.
- Salespeople can browse or search the sales catalog from the Opportunity UI (callout 1) and select the products the customer is interested in buying.
- You can price the products using price books (callout 2), or create quotes for them in Oracle Configure, Price, and Quote Cloud (callout 6). Price books and CPQ Cloud require additional integration, so are not covered in this guide. (Although price books are a feature of Oracle Sales Cloud, you must integrate them with opportunities using Groovy scripting.)
- The products you create can also be servicd in Oracle Engagement Cloud (callout 8), also not covered here.
- The Oracle Fusion Product Model (callout 7) forms the foundation of the Oracle Product Hub Cloud (callout 10), a powerful product management application designed for supply chain, order management, and inventory tasks, which must be licensed separately. Because Oracle Sales Cloud uses less than a dozen of the hundreds of the item attributes that can be captured in Oracle Product Hub, you cannot use the Oracle Sales Cloud UIs or product import if you are implementing Oracle Product Hub Cloud. To create products in Oracle Product Hub Cloud that can be
used with Oracle Supply Chain Cloud or Oracle ERP Cloud (callout 11), you must use the Oracle Product Cloud Hub UI and item import (callout 9).

How You Create a Sales Catalog
To create the sales catalog, you:

1. Create the root product group of the catalog. You can create the product group in the UI or you can import it with the rest of the product groups. You are only required to create the root product group. All the other product groups are optional.

2. Create the products for your sales catalog either in the UI or by importing them into Oracle Sales Cloud.

3. You can import the rest of the product group hierarchy, if any.
To display individual products in the sales catalog, you must associate the product groups with the products. You can create the association by editing each product group in the UI and selecting the products it contains. Alternatively, you can create the association between product groups and the products in your import.

Oracle provides Excel macros that you can use to speed up your import of products and the product groups and their associations with the products. These import macros are discussed in the Importing Products and Product Groups section in this chapter.

The following figure shows the Vision Corp. sales catalog structure. The company is selling three types of servers: Green Servers, Sentinel Servers, and the Ultra Power Servers, so it creates Vision Servers as the root product group in the UI. The remaining product groups and the products in them are imported. To create the catalog, Vision:

1. Creates the Vision Servers root product group in the UI.
2. Imports the products using the product import macro.
3. Imports the remaining product groups and their associations with the products using the product group import macro.

The following diagram shows the sample Vision Corp. sales catalog configuration. The sales catalog consists of the root product group Vision server and three product groups representing the server families: Green Servers, Sentinel Servers, and Ultra Power Servers. Each server family includes three server products. The Green Server products are: Green Server 3000, Green Server 6000, and Green Server 9000. The Sentinel Server products are: Sentinel Server 1500, Sentinel Server 3000, and Sentinel Server 7000. The Ultra Power Servers are: Ultra Power Server 1000, Ultra Power Server 3000, and Ultra Power Server 4000.

Creating the Root Product Group

Use this procedure to create the root product group for your sales catalog. You can follow a variation of the same procedure to manually create other product groups or you can import the rest.

To create the root product group:

1. While signed in as a setup user, open the Manage Product Groups task from the implementation project. Alternatively, setup and sales administrator users can search for the task by name in the Setup and Maintenance work area.

The Manage Product Groups page appears.
The following figure shows a partial screen capture of the Manage Product Groups page highlighting the View menu (callout 1), the Create icon (callout 2), and the Download to Excel icon (callout 3).

2. Click **Create** in the Manage Product Groups region.

   The Create Product Group page appears.

3. Enter an internal name without spaces in the **Name** field, for example **VisionServers**. This name is not displayed in the catalog.

4. Enter a name that you want displayed in the catalog in the **Display** field, for example **Servers**.

5. Enter an optional description in the **Description** field.

6. Make sure the **Active** option is selected.

7. Deselect the **Allow Duplicate Children** option.

   **Note:** You must deselect **Allow Duplicate Children** for all product groups because Oracle Sales Cloud does not permit the same product groups to appear multiple times in the sales catalog hierarchy.

8. Select the **Root Catalog** check box for the root product group.

9. Click **Save**.

10. You must now save the reference number of the root product group you just created for entry in the product group import macro. The reference number links the product groups you are importing to the root product group. To save
the reference number, you can download the root product group information as a Microsoft Excel file. Use these steps:

a. Click View and select Columns, Show All to display all columns.
b. Click Export to Excel column and save the Excel file to your desktop. The reference number you need is in column D.

11. Click Save and Close.
12. Click Save and Close on the Manage Product Groups page.

Prerequisite Setups for Products

Setting Up Units of Measure for Products

You must set up the classes of the units of measure and the units of measure that your sales organization uses to sell and price the products in the sales catalog. For example, if you are selling consulting services where you charge by the hour and the minute, then you must set up Time as the class of the units of measure and create hours and minutes as the units of measure. For goods that are priced by the box and by the unit, you must set up Quantity as the class and box and each as the units of measure. If you are selling and pricing goods by the meter, then you must set up Dimension as the class and create Meters as a unit of measure, and so on.

To set up a unit of measure, do the following:

1. While signed in as a setup user, click Go to Task for the Manage Units of Measure task in the implementation project or after searching for the task by name in the Setup and Maintenance work area.

The Manage Units of Measure page appears.

2. To create the class for a unit of measure, do the following:

a. Click Manage UOM Classes.

The Manage UOM Classes page appears.

b. For each class, do the following:

i. Click Add, (the plus sign icon in Search Results).
ii. Enter the class name and optional description.

For example, for quantity, enter Quantity as the Class.

iii. Enter the smallest unit you are selling for the class as the Base UOM.

For example, for the class Quantity, enter Each.
The following figure shows the Manage UOM Classes page.

3. Click **Save and Close**.
4. You created the smallest unit of measure as the Base UOM for each class. Now create any additional units of measure for each class as follows:
   a. On the Manage Units of Measure page, click **Add**, (the plus sign icon) in Search Results.
   b. Enter the name of the unit of measure.
      For example, if your Base UOM for the class Time was Minute, then you create Hour as another unit of measure if your organization charges by the hour.
   c. Select a class from the **Class** list.

   ✍️ **Note:** You can ignore the rest of the fields and buttons on the page because they are either not required or not used by Oracle Sales Cloud.

5. Click **Save and Close**.

### Creating a Location

You must create a location as a prerequisite for setting up the required item master organization. Because Oracle Sales Cloud does not use the location for any other purpose, you can enter only the minimum information required.

To create the location:

1. Open the **Manage Locations** task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.
   The Manage Locations page appears.
2. Click **Create**.
3. In the Location Information region **Name** field, enter any name. For example, HQ.
4. Enter any combination of letters or numbers without spaces in the **Code** field. For example, HQ.
5. Leave or the other values as they are.
6. Click **Submit**.
The application displays a warning informing you that the request will be submitted.

7. Click Yes.
8. Click OK to close the confirmation message.

Creating the Item Master Organization

Because Oracle Sales Cloud uses the Oracle Fusion Product Model to store sales products, you must create an item master organization as a prerequisite to using products in Oracle Sales Cloud. However, because you are not tracking items in inventory, the location of the item master organization and other details are not important.

To set up the item master organization, do the following:

1. While signed in as a setup user, open the Manage Item Organizations task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.
   
The Manage Item Organizations page appears.

2. Click Create (the plus icon).
   
The Create Item Organization page appears.

3. Enter any name in the Name field, for example, Vision Item Master.
   
   You must select this name when setting the system profile option Sales Products Item Organization in a separate and related task. This name is visible only during setup.

4. In the Organization field, enter any combination of up to 18 uppercase letters and numbers, for example, VISION.
   
   You must enter this name in the separate and related setup task: Manage Spoke Systems.

5. In the Name field in the Location region, click the down arrow and select Search from the list.

   The Search and Select: Location Details window appears.

6. In the Name field, enter the name of the location you created.

7. Click Search.

8. Select the organization name and click OK.


   The Manage Item Organization Parameters page appears.

10. From the Item Master Organization list, select the organization name you entered in the previous page (Vision Item Master). This selection establishes the organization as the item master.

11. In the Starting Revision field, enter a number. For example, 1. Again, your entry does not matter in Oracle Sales Cloud.

12. Click Save and Close.

Specifying the Item Master Organization Used in Oracle Sales Cloud

You must set the Sales Products Item Organization system profile option to the item master organization you just created.

Set the system profile option as follows:

1. Open the Manage Administrator Profile Values task from the implementation project or after searching for the task by name in the Setup and Maintenance work area.

   The Manage Administrator Profile Values page appears.
2. In the **Profile Option Display Name** field, enter *Sales Products Item Organization*.
3. Click **Search**.
4. Click the name of the profile option in the search results.
5. In the **Profile Value** field, select the item organization you created from the list.
6. Click **Save and Close**.

### Identifying the Item Master Organization as the Source of Import Data

You must specify the item organization as the default source of the import data for the Product Information Management Data Hub using the Manage Spoke Systems task. Spoke systems (also called source systems) enable users to identify the source of import data.

To identify the item organization using the Manage Spoke Systems task, do the following:

1. Open the **Manage Spoke Systems** task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.
   
   The Manage Spoke Systems page appears. You can ignore any error message you may receive regarding read permissions.

2. In the **Name** column in the Search Results region, click the **Product Information Management Data Hub** link.
   
   The Edit Spoke System: Product Information Management Data Hub page appears.

3. On the Import Options tab, select the item master organization name you created earlier. For example, VISION.

   The following figure shows a screen capture of the Edit Spoke System: Product Information Management Data Hub page with the Default Organization field highlighted.
4. Click **Save and Close**.

## Importing Products and Product Groups

### Downloading the Macros for Importing Products and Product Groups

To import products and product groups, you must download two separate macros. The import uses the mapping already provided in your application for both imports:

<table>
<thead>
<tr>
<th>File Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>R12 Product Quick Import Macro.xlsx</td>
<td>An Excel macro where you enter the products you want to import</td>
</tr>
<tr>
<td>R12 Product Group Quick Import</td>
<td>An Excel macro where you enter the product group hierarchy and specify which product group.</td>
</tr>
<tr>
<td>Macro.xlsx</td>
<td></td>
</tr>
</tbody>
</table>

The files are available on My Oracle Support, in article Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1).

Follow these steps to download the files:

1. Sign in to support.oracle.com.
2. Search for 2229503.1.
3. Scroll down in the article to the Details region and click on the Product Import Macro and Product Group Macro links in the Excel Macro Files column to download the Excel macro files from the table.
4. Save the macro files to separate folders on your computer.

The application saves import logs to each folder.

### Entering Data into the Product Import Macro and Importing

Follow these steps to enter data into the R12 Product Quick Import Macro.xlsx and perform the import.

> **Note:** You can extend the macro to import additional standard and custom fields. If you do, then you must create a new mapping to use in your import. The steps for customizing macros are not covered in this guide.

1. Open the R12 Product Quick Import Macro.xlsx file you downloaded earlier.

   If you have not enabled macros, Microsoft Excel warns you that macros have been disabled. In this case:
   
   a. Click **Options**.

   The Microsoft Office Security Options window appears.
   
   b. Select the **Enable this content** option and click **OK**.

2. Do not change the entries in the required **Language** and **Mapping** fields. The macro is set up to import product information in US English.
If you use the macro to import additional and custom attributes, not covered in this guide, then you must create your own mapping and enter its number here.

3. On the UOM worksheet, click **Populate UOM from Server**.

4. On the Login page, enter the following:
   - Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/sales`.
   - Your user name
   - Your password

5. Click **Submit**.

The macro retrieves the units of measure you set up from your environment and enters them into the worksheet so they are available as the list of values in the Primary UOM field in the Template worksheet.

6. If you edited the product type lookup type QSC_SALES_PRODUCT_TYPE, then retrieve the latest values on the Product Type worksheet:
   - Click **Populate UOM from Server**
   - The Login window still contains the host, user name, and password you entered previously, so click **Submit**.

   The macro retrieves the latest product types from your environment and enters them into the worksheet so they are available as the list of values in the Product Type field in the Template worksheet.

7. In the Template worksheet, enter your product data. You can import up to 1,000 records at a time. The following table describes the columns. The macro requires just three pieces of information:
   - Product number
   - Name
   - Primary UOM

The following table provides the details of each attribute:

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Number</td>
<td>You can enter the unique product number of the product or leave this required column blank. If you do not enter a product number, then the macro generates the product number automatically using the date and time. The product number displays in the product records visible in the Products work area and the application uses the product number to identify the product record for updates.</td>
</tr>
<tr>
<td>Name</td>
<td>The product name as it will appear in the sales catalog.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a text description.</td>
</tr>
<tr>
<td>Primary UOM</td>
<td>Unit of measure. One of the values in the UOM worksheet.</td>
</tr>
<tr>
<td>Product Type</td>
<td>Product type. One of the values in the Product Type worksheet.</td>
</tr>
<tr>
<td>Eligible to Sell</td>
<td>Enter Y if you want the product to appear in the sales catalog. A value of N imports the product, but does not show it in the catalog or make it available for selection by salespeople.</td>
</tr>
</tbody>
</table>
### Column | What to Enter
--- | ---
Eligible for Service | This column is used only if you are integrating with the Oracle Engagement Cloud. Enter Y to enable service requests for this product. If the product is not eligible for service, then enter N.

8. When you are done with your entries, click **Create Import Activity**.

9. If the **You must correct errors in your entries** message appears, then:
   - a. Click **OK**
      
      The Error worksheet displays your errors.
   - b. Click each error link in column D and make the correction on the Template worksheet.

   ![Note:](image) After you correct an error, you must click outside the field for the correction to be recognized.
   - c. Click **Create Import Activity** again.

10. On the Login page, enter the host, user name, and password if required.

11. Click **Submit**.

   The application displays one of the messages listed in the following table:

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted successfully.</td>
<td>Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>Unable to connect to the server at this time.</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>Unable to submit the file import activity. Check log for details.</td>
<td>You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors work sheet to view the error details.</td>
</tr>
</tbody>
</table>

12. If your import activity was submitted successfully, then click **Activity Details**.

   The Activity Details window appears, listing the import activity name, its ID and its status.
   - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
   - If your import completed successfully, then the status listed is **Completed**.

13. Optionally, click **Generate Log** to save a file listing the products that were imported.

### Adding Product Images

You can add images to the products in your catalog by editing the products in the Products work area. You cannot import images.

To add images to products, do the following:

1. While signed in as a setup user, navigate to the Products work area.
2. Search for the product by product number, or, if you want to search by product name, do the following:
   a. Click **Advanced Search**.
      The Advanced Search pane opens.
   b. Click **Add** and select **Name** from the list.
   c. Enter the product name or the first few letters of the name in the field.
   d. Click **Search**.
3. Click the product number link for the product
   The Edit Product pages appears.
4. Click **Manage Attachments** (plus sign icon) under the Images heading.
   The Attachments window appears.
5. Click the Choose File button and select the image.
   You can only include one image for each product.
6. Click **OK**.
7. Click **Save and Close**.

### Entering Data into the Product Group Import Macro and Importing

Follow these steps to enter data into the product group import macro and perform the import.

> **Note:** You can extend the macro to import additional standard and custom fields. If you do, then you must create a new mapping to use in your import. The steps for customizing the macros are not covered in this guide.

1. Open the R12_Product_Group_Quick_Import Macro.xlsx file you downloaded earlier.
2. If you have not enabled macros, then Microsoft Excel warns you that macros have been disabled. In this case, do the following:
   a. Click **Options**.
      The Microsoft Office Security Options window appears.
   b. Select the **Enable this content** option and click **OK**.
3. Do not change the entries in the required **Language** and **Mapping** fields. The macro is set up to import product information in US English using the default mapping. If you use the macro to import additional and custom attributes, not covered in this guide, then you must create your own mapping and enter its number here.
4. In the **ProductGP_Data** worksheet, enter the product groups in your sales catalog hierarchy starting at the top of the hierarchy, right underneath the root product group you created earlier. For each product group, you must enter its parent.

The following table provides the details of each column:

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Group Reference Number</td>
<td>Enter a unique alphanumeric ID. You can enter the product group name without any spaces. For example, if your product group is Green Servers, you can enter GreenServers. The macro enters this value as the Product Group Internal Name for each product group. The Product Group Internal Name is visible in the Manage Product Groups task UIs.</td>
</tr>
<tr>
<td>Product Group Display Name</td>
<td>The name of the product group as it will appear in the sales catalog.</td>
</tr>
</tbody>
</table>
5. Specify which products appear in which product group on the ProductGP_Product_Relation worksheet. To establish the relationship, you enter the product group reference number and the product number you obtain from the product import macro.

6. When you are done with your entries, click Create Import Activity.

7. On the Login page, enter the following:
   - Host information for your environment. The host name is the portion of the URL of your environment between https:// and /sales.
   - Your user name
   - Your password

8. If the You must correct errors in your entries message appears, then:
   a. Click OK
      The Error worksheet displays your errors.
   b. Click each error link in column D and make the correction on the Template worksheet.

   Note: After you correct an error, you must click outside the field for the correction to be recognized.

   c. Click Create Import Activity again.

9. Click Submit.
   The application displays one of the messages listed in the following table:

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted successfully.</td>
<td>Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>Unable to connect to the server at this time.</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>Unable to submit the file import activity.</td>
<td>You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors worksheet to view the error details.</td>
</tr>
</tbody>
</table>

10. If your import activity was submitted successfully, then click Activity Details.
    The Activity Details window appears, listing the import activity name, its ID and its status.
    a. If the import activity is still in progress, you can refresh the status periodically by clicking Refresh.
If your import completed successfully, then the status listed is **Completed**.

11. Optionally, click **Generate Log** to save a file listing the product groups that were imported.

### Publishing the Sales Catalog

Product groups must be published before they are available for use. If you imported any of the product groups in your sales catalog, then the import process automatically publishes all product groups you created and you can skip this step. If you created product groups in the UI and did not import any, then you must manually lock and publish the product groups created in the UI as described in this topic.

**Note:** You cannot delete product groups after they are published. If you make a mistake, then you can inactivate the existing product groups, and create and publish new ones.

To publish the sales catalog:

1. While signed in as a setup user, open the Manage Product Groups task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.
2. Click the task name link in the search results.
3. In the Manage Product Groups page, select the root node of the catalog that you're going to publish.
4. Click **Lock**.
5. Click **Publish**.

The application publishes all product groups that are locked.

6. Click **Yes** in the Confirm Publish dialog box.
7. Click **OK** on the confirmation message.
8. Click **Save and Close**.

Every time you publish, the application automatically runs the scheduled process Refresh Denormalized Product Catalog Table for BI. This process updates the product group hierarchy in territories, opportunities, and other consuming applications.

### Making Your Sales Catalog Available for Use

To make the sales catalog available for use in opportunities, leads, and territories, you must assign the root of the product group hierarchy to the "Base" usage in the Manage Product Group Usage page and set a few options. You must then run the Refresh Denormalized Product Catalog Table for BI process.

### Assigning the Catalog Root to the Base Usage

1. Sign in as a setup user or as the sales administrator user.
2. Open the **Manage Product Group Usage** task from the implementation project or after searching for the task in the Setup and Maintenance work area.

The Manage Product Group Usage page appears.

3. In the upper portion of the Manage Product Group Usage page, select the **Base** record.
4. In the Details region in the lower portion of the page, click **Select and Add**.
Note: If a product group is already associated with the Base usage, then you must remove the product group first by clicking Delete.

5. In the Select and Add: Root Product Groups window, search for the root product group you are assigning to the Base usage.
6. Select the record and click OK.

The following figure shows the screen capture of the Manage Product Group Usage page. Callout 1 highlights the Base usage record you select. Callout 2 shows the location of the Select and Add icon. Callout 3 shows the Base: Details Product Group tab where the root product group you selected is listed.

7. On the Manage Product Group Usage page, click Save.
8. Click the Miscellaneous tab and set the following options for sales catalog searching and browsing. You may have to scroll to see all of the options. Some options are repeated multiple times to permit settings for different objects:
   - **Search Product Groups**
     - This option determines if you can search product groups and products or just products alone in opportunities and leads:
       - A setting of Yes returns both product groups and products. If you're using not using products in your catalog, then you must use this setting.
       - When you search for the term Green, the application returns all product groups and products with that term in the name or description, such as Green Servers (product group), Green Server 3000 (product), and Green Server 6000 (product).
       - A setting of No (the default setting) returns products only.
When you search for the term Green, the application returns only products with that term in the name or description, such as Green Server 3000, Green Server 6000, and Green Server 9000.

- Show Immediate Child Products Only

If you are using products, then this option determines which products display under the Products heading in the Browse Catalog window in opportunities. You can ignore this option if you are not using products.

- When set to Yes (the default setting), you can see only the products within the selected product group.

Suppose that the product group Servers has no products within it, but its subgroups, Green Servers and UltraPro Servers, each have several products within them. When the user clicks the Servers product group in the catalog browse pane, no products display in the Products section.

- When set to No you can also see the products within the subgroups of the selected product group. If you’re using only product groups in your catalog, then this setting has no effect on the browse feature.

Suppose the product group Servers has no products within it, but its subgroups, Green Servers and UltraPro Servers each have several products within them. When the user clicks the Servers product group in the catalog browse pane, all the products contained within the Green Servers and UltraPro Servers product groups display in the Products section.

9. Click Save and Close.

Running the Refresh Denormalized Product Catalog Table for BI Process

You must run the Refresh Denormalized Product Catalog Table for BI process to ensure that the sales catalog can be used in consuming applications. For example, if you do not run this process, then you cannot use products as a sales territory dimension. To run the process, open the task Refresh Denormalized Product Catalog Table for BI task in the implementation project and click Submit.

You can also run this process from the Scheduled Processes UI. If you do, then you must enter a percent sign between the words in the name when searching. For example: Refresh%Denormalized (you can enter just the first two words to find the process).

Validating the Sales Catalog in the Application

After you have published and enabled your catalog for Oracle Sales Cloud, you can check that the product groups are visible in opportunities.

1. Sign in as a sales manager or salesperson.
2. Navigate to the Opportunities work area.
3. Click Create Opportunity.

The Create Opportunity page appears.
4. Enter the opportunity name and click Save and Continue.
5. In the Products region, click Add.
6. For Type, select Group.
7. Verify that your product groups display in the Name list.
Enabling Sales Catalog Browsing in Opportunities

You can enable salespersons to browse the sales catalog while editing opportunities by setting the system profile option Browse Sales Catalog in Opportunities Enabled. Setting this profile option to Y displays the Browse Catalog button which you can use to browse the catalog on the Edit Opportunity page. While browsing the sales catalog, salespersons can view the product group hierarchy, search for product groups and products, and add any of the product groups or products as opportunity lines.

The following figure highlights the location of the Browse Catalog button on the Edit Opportunity UI.

Setting the Profile Option

1. Open the Manage Opportunity Profile Options task from the implementation project. Alternately, you can open the task from the Setup and Maintenance work area after searching for it by name.

   The Manage Opportunity Profile Options page appears.

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

3. Click **Search**.

4. In the search results, click on the profile option name link.

5. Set the profile option value to **Y**.

6. Save your changes.
13 Importing Accounts and Contacts

Importing Accounts and Contacts Overview

After you set up your sales organization, you can import accounts and their contacts. You import the accounts and contacts using separate Excel macros, first the accounts and then the contacts. Optionally, you can also import account hierarchies, visual representations of the structure of multi-layered organizations.

The import Excel macros and their mapping files are available on My Oracle Support in document Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1). The following table lists the tasks that you perform to complete the imports. You can open many of the tasks directly from the Import Accounts and Contacts folder of the implementation project, as indicated.

Before you start, read the topics in the Account and Contact Import Concepts section.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Download the Excel macro and mapping files from Oracle Support document 2229503.1.</td>
<td>No task for this step.</td>
<td>See the Downloading Macros and Mapping Files topic in this chapter.</td>
</tr>
<tr>
<td>2.</td>
<td>Upload the mapping files into your application and record the mapping numbers for each.</td>
<td>Manage File Import Mappings</td>
<td>See the Uploading Mapping Files and Recording Their Numbers topic in this chapter.</td>
</tr>
<tr>
<td>3.</td>
<td>Optionally, specify which industry classification category you want to use to classify your accounts in the system profile option MOT_ INDUSTRY_CLASS_ CATEGORY. By default, the application uses the industry classifications provided by Oracle (CUSTOMER CATEGORY) but other classification categories, including SIC and NAICS, are available</td>
<td>Manage Administrator Profile Values</td>
<td>See the Specifying the Industry Classification for Accounts topic in this chapter.</td>
</tr>
<tr>
<td>4</td>
<td>If you are classifying the accounts by industry in your import, then you must obtain a list of the industry classification codes for the industry category you are using. You enter the codes in the macro.</td>
<td>Manage Classification Categories</td>
<td>See the Viewing Classification Categories for Accounts topic in this chapter.</td>
</tr>
<tr>
<td>5.</td>
<td>Obtain the application-generated IDs for the salespeople you created. You must enter these IDs in your account and opportunity import to identify account and opportunity owners.</td>
<td>Schedule Export Processes</td>
<td>See the Exporting Account Owner and Opportunity Owner IDs topic in this chapter.</td>
</tr>
</tbody>
</table>
### Account and Contact Import Concepts

#### About Importing Accounts and Contacts

Although you can create a few test accounts and contacts in the user interface, you will probably want to import some of your existing sales data so that you can test your sales territory assignment and other features.

Importing your account and contact data is a bit more complex than importing users or your sales catalog because customer data such as addresses and contact points are stored in different objects in the application. This means that, in addition to the data itself, you will be adding reference IDs into your file so the application can relate the data you import. For example, to import accounts and their contacts, you will first import the accounts and then use their reference IDs to import their contacts. The reference information you add to each object in the file also permits you to update the information later, if required.

#### Information You Are Importing for Accounts

In Oracle Sales Cloud, you use accounts to import basic information about the organizations important to your business. This information, which appears in the Edit Account page Account Profile tab in the UI, includes the following:

- Organization name
- Account type

The account can be of type customer or prospect. A customer is an account you have sold to in the past.
• Industry classification
• Account owner: the salesperson who owns the account
• Address
• Phone
• Fax
• URL

The following figure shows a partial screen capture of the Profile tab of the Edit Account page. Note that the page includes both the account information listed previously as well as information you must import separately with the contact object (such as the primary contact name, phone, and e-mail) and account hierarchy object (parent account and the View Account Hierarchy link, which users click to gain access to a visual representation of account hierarchies).

Information You Are Importing for Contacts

For contacts, you are importing the basic information about the contact which appears on the Profile tab of the Edit Contact page. The information you can import includes not only the name, address, phone, and other contact information, but also the contact owner and the related account, if any.
The following figure contains a partial screen capture of the Profile tab on the Edit Contact page.

About Importing Addresses for Accounts and Contacts

Oracle Sales Cloud stores addresses and other information you import as separate objects. When you import an address, for example, the application creates a location containing the address information, and a site, which provides the link between the location and the account or contact. If you are importing a contact at an existing account address, you can:

- Import the address once with the account and share that address with the contact.

Reusing the account address for the contact is the equivalent of selecting the Use account address option when creating the contact in the UI. To reuse the account address, you import the address with the account and reference the address in the contact import file using the location ID you entered in the account import file.
The following figure shows how you can reference the account address in your contact import file by including the location ID you imported for the account.

- You import the same address twice: once for the account, and a second time for the contact.

Doing so creates two locations and duplicate addresses. You must update two addresses in the future if there are changes.
The following diagram shows the two locations with the duplicate address.

You reference the objects such as the organization and the location using reference IDs you include in your import files. The following figure explains how you reference the account and its address in the contact import macro.

- The account import macro includes a unique ID in the Account Number column, which identifies the account. A unique ID in the Address Location OSR column identifies the address.
- In the contact import macro, you enter the account number to link the contact to the account. Entering the ID from the account Address Location OSR column references the account address.
About Account Hierarchies

An account hierarchy provides a visual representation of relationships between accounts. Salespeople can view the hierarchy to see the position of the opportunity account in a multi-layered organization. Each account in the hierarchy can have only one parent account.

The following figure is a screen capture of the hierarchy of the fictitious Pinnacle Technologies company and its four subsidiaries.

You can create and maintain the account hierarchy in the UI, using a link in the Edit Account page Profile tab. Alternatively, you can import the hierarchy as described in this chapter. When no account hierarchy is defined for an account, the link on the Edit Account page displays as Create Account Hierarchy. When the account is part of a hierarchy, the link displays instead as Manage Account Hierarchy.
The following figure shows a partial screen capture of the Profile tab on the Edit Account page, highlighting the location of the Manage Account Hierarchy link.

For more information about creating an account hierarchy in the UI, see the Oracle Sales Cloud Using Sales guide.

**Related Topics**
- Oracle Sales Cloud Using Sales

## Downloading Macros and Mapping Files for Account and Contact Import

You must first download and save the macros and associated mapping files in separate folders on your computer. Create a separate folder for accounts, contacts, and account hierarchy (if you are importing it). The macros save log files to these same folders.

To download the files:

2. Search for 2229503.1.
3. In the Details section of the Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1) document, download the files from the Excel Macro Files and Mapping Files columns.

<table>
<thead>
<tr>
<th>File Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>R12 Account Quick Import Macro</td>
<td>An Excel macro which you populate with the account data that you want to import.</td>
</tr>
<tr>
<td>R12 Account Import Macro Mapping</td>
<td>The mapping the application uses for the import.</td>
</tr>
</tbody>
</table>
Uploading Mapping Files and Recording Their Numbers

You must upload the mapping file for each macro into the application and record the mapping number. You can either record the number on the Manage File Import Mapping page by hand, or you can drill down on the mapping name and copy the number to your clipboard from the Edit Import Mapping page.

Perform the following procedure to record the mapping ID separately for accounts, contacts, and account hierarchy:

1. While signed in as a setup user, navigate to the Setup and Maintenance work area. Open the Manage File Import Mappings task from the implementation project or after searching for the task by name.
   The Manage File Import Mapping page appears.
2. Click Import Mapping at the top of the page.
3. Click Choose File and select the mapping file and click OK.
   The mapping is now listed at the bottom of the page.
4. You must enter the mapping number into the import macro. You can either record the number on the Manage File Import Mapping page by hand, or you can drill down on the mapping name and copy the number to your clipboard from the Edit Import Mapping page.

Specifying the Industry Classification for Accounts

Use the following procedure to specify which industry classification category you want to use for accounts. The classifications for the category you select appear in the list of values for the Industry field in the Account user interface. The classifications can also be used in the sales territory Industry dimension and to create leads using Sales Predictor rules. By default, the profile is set to CUSTOMER_CATEGORY.

1. While signed in as a setup user, open the Manage Administrator Profile Values task from the implementation project. Alternately, you can search for the task by name in the Setup and Maintenance work area.
   The Manage Administrator Profile Values page appears.
2. In the Search: Profile Option region, Profile Option Code field, enter MOT_INDUSTRY_CLASS_CATEGORY
3. Click Search.
4. Select the classification category from the **Profile Value** list. The available values are:
   - 1972 SIC
   - 1977 SIC
   - 1987 SIC
   - CUSTOMER_CATEGORY
   - NACE
   - NAF
   - NAICS_1997
   - NAICS_2002

5. Click **Save and Close**.

**Viewing Classification Categories for Accounts**

Use the following procedure to find the account classification codes to use in the account import macro.

1. While signed in as a setup user, open the **Manage Classification Categories** task from the implementation project. Alternately, you can search for the task by name in the Setup and Maintenance work area.

   The Manage Classification Categories page appears.

2. In the Search region, enter the classification category name. For the default category provided by Oracle, enter **CUSTOMER_CATEGORY**

3. Click **Search**.

4. Click the classification category name.

   Use the classification codes listed in the Classification Code column on the page for entries in the import macro.
The following figure shows a screen capture of a part of the Classification Category page for the CUSTOMERCATEGORY provided by Oracle.

### Classification Category: CUSTOMERCATEGORY

#### Overview

- **Classification Category**: CUSTOMERCATEGORY
- **Classification Category Meaning**: Industry
- **Classification Category Description**: High level industrial categories of customers.

#### Entity Assignment

<table>
<thead>
<tr>
<th>Table Name</th>
<th>Where Clause</th>
</tr>
</thead>
<tbody>
<tr>
<td>HZ_PARTIES</td>
<td>WHERE PARTY_TYPE = 'ORGANIZATION'</td>
</tr>
</tbody>
</table>

#### Classification Codes

<table>
<thead>
<tr>
<th>Classification Code Meaning</th>
<th>Classification Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Services</td>
<td>SERVICES</td>
</tr>
<tr>
<td>Media and Entertainment</td>
<td>MEDIA_AND_ENTERTAINMENT</td>
</tr>
<tr>
<td>Metals and Mining</td>
<td>METALS_AND_MINING</td>
</tr>
<tr>
<td>Non-profit</td>
<td>NON-PROFIT</td>
</tr>
<tr>
<td>Real Estate</td>
<td>REAL_ESTATE</td>
</tr>
</tbody>
</table>

5. Click **Done**.

### Procedure

You must export the IDs of the resources you created to identify account and opportunity owners in your account and opportunity imports. The account import macro requires you to enter the Party ID of the salesperson who owns an account.
The opportunity import macro requires the Registry ID to identify the opportunity owner. You can obtain both IDs using the following procedure.

To obtain the IDs you need for import, do the following:

1. While signed in as a setup user, open the **Schedule Export Processes** task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance Work area.
   
   The Overview page appears.

2. From the **Actions** menu, select **Create**.
   
   The Create Export Process Definition: Enter Basic Information page appears.

3. Enter a name for your export.

4. Click **Next**.
   
   The Create Export Process Definition: Configure Export Objects page appears.

5. From the **Actions** menu, select **Create**.
   
   The Manage Export Objects window appears.

6. In the Available Objects window pane, scroll down and select **Party**, and click **Move selected items to other list** (the right-arrow key) to move your selection to the Selected Objects list.

7. Click **Done**.
   
   The Create Export Process Definition: Configure Export Objects page appears.

8. Add a filter to minimize the size of your export file as follows:
   
   a. In the Details region, click **Edit Filter Criteria**
      
      The Edit Filter Criteria window appears.

   b. Click **Add Fields**, scroll down and select **Party Type** from the list.

      The Party Type field appears as a row in the window.

   c. For **Party Type**, select the equal sign (=) as the operator and enter **PERSON** as the value.

   d. Click **Add Fields**, scroll down and select **Internal Flag** from the list.

   e. For **Internal Flag**, select the equal sign (=) as the operator and enter **Y** as the value.

   f. Click **Save**.

      The Create Saved Search window appears.

   g. Enter a name for the filter such as **Resources**.

   h. Select the **Set as Default** option.

   i. Click **OK**.

      You are returned to the Edit Filter Criteria page.

   j. Click **OK**.

      You are returned to the Create Export Process Definition: Configure Export Objects page.

9. Click **Next**.

   The Create Export Process Definition: Create Schedule page appears. The schedule is set to run immediately after you activate.

10. Click **Next**.

    The Create Export Process Definition: Review page appears.

11. Click **Activate**.
The Overview page appears.

12. When the process completes, the process results appear in the History region at the bottom of the page.
13. Click the file name link in the Exported Data File column and save the file to your desktop.
14. When you prepare your account import macro, you must populate the Account_Owner_Party_Id values in your import file with the Party IDs you exported. To find the Party IDs, do the following:
   a. Open the file in a spreadsheet program such as Open Office or Excel.
   b. Search for each resource by their full name or scroll to the Name column (Column CS). The Party ID column is located to the left of the Name (Column CR). If the party ID appears in scientific notation, then you must format the column to display as a number with zero decimal places.
   c. To populate the Owner Number fields for opportunity import, you must instead use the values in the Registry ID column (Column CT).

Entering Data and Importing

Entering Data into the Account Import Macro and Importing

You must populate the account import macro with your data and then import the accounts. You can enter a maximum of 1000 records in the macro.

Note: You can extend the macro to import additional standard and custom fields. If you do, then you must create a new mapping to use in your import. The steps for customizing macros are not covered in this guide.

To populate the macro and import accounts:

1. Open the R12 Account Quick Import Macro.xlsm.
2. If you have not enabled macros, then Microsoft Excel warns you that macros have been disabled. In this case, do the following:
   a. Click Options.
      The Microsoft Office Security Options window appears.
   b. Select the Enable this content option and click OK.
3. The values in the following two fields in the header are preset:
   a. Country Code is set to US.
      You can change this setting to another ISO country code if you are importing accounts located in another country.
   b. Class Category is set to CUSTOMER_CATEGORY.
      CUSTOMER_CATEGORY is the default account classification provided by Oracle. If you are using another category to classify accounts, such as 1987 SIC or NAICS 2002, then you must select that category in system profile option MOT_INDUSTRY_CLASS_CATEGORY and enter it here. See the Specifying the Industry Classification for Accounts topic in this chapter for details.
4. Enter the mapping number in the Mapping field.
5. Enter the account data in the columns provided. The following table explains the columns.
The table below provides details on what to enter for each column when importing accounts and contacts:

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Number</td>
<td>Unique ID for the organization. If you leave this required column blank, then when you import, the macro generates the account number automatically using the date and time. The account number is used to identify the organization for account updates. You also enter this number into the contact import macro.</td>
</tr>
<tr>
<td>Account Name</td>
<td>The name of the organization. Entry in this column is required.</td>
</tr>
<tr>
<td>D-U-N-S number</td>
<td>The data universal numbering system (D-U-N-S) number from Dun &amp; Bradstreet Corporation.</td>
</tr>
<tr>
<td>Account Type</td>
<td>Enter either ZCA_CUSTOMER or ZCA_PROSPECT.</td>
</tr>
<tr>
<td></td>
<td>- ZCA_CUSTOMER for organizations you have sold to in the past.</td>
</tr>
<tr>
<td></td>
<td>- ZCA_PROSPECT for potential customers. If an organization still requires qualification, then you should consider importing the record as a lead instead.</td>
</tr>
<tr>
<td></td>
<td>If you leave this column blank, then the macro enters ZCA_PROSPECT.</td>
</tr>
<tr>
<td>Owner ID</td>
<td>The Party ID for the account owner that you obtained from the export file. See the Exporting Account Owner Party IDs topic for details.</td>
</tr>
<tr>
<td>Address Location OSR</td>
<td>A unique identifier for the address. If you leave this column blank, then the macro generates the number for you when you import.</td>
</tr>
<tr>
<td></td>
<td>If you want to link a contact to the address you import for the organization, then you copy the ID in this column to the Address Location OSR column in the contact import macro.</td>
</tr>
<tr>
<td></td>
<td>If you want to reuse an address from another account, then you can enter the Address Location OSR value from that address and skip the address fields.</td>
</tr>
<tr>
<td>Address 1</td>
<td>Enter the street address.</td>
</tr>
<tr>
<td>Address 2</td>
<td>Enter additional address information, such as the suite number.</td>
</tr>
<tr>
<td>Address 3</td>
<td>This column is hidden in the macro.</td>
</tr>
<tr>
<td>City</td>
<td>City.</td>
</tr>
<tr>
<td>State</td>
<td>For the US, enter a state all in capital letters. For example, CALIFORNIA. This format is required for assigning accounts using geographical territories set up by state if you are using the Nokia geography reference data for the US.</td>
</tr>
<tr>
<td>County</td>
<td>This column is hidden in the macro.</td>
</tr>
<tr>
<td>Province</td>
<td>This column is hidden in the macro.</td>
</tr>
<tr>
<td>Postal Code</td>
<td>Postal code.</td>
</tr>
<tr>
<td>URL</td>
<td>The URL.</td>
</tr>
</tbody>
</table>
### Importing Accounts and Contacts

**Note:** The macro includes additional hidden columns (Column O - Column Z) you can use to import the phone, fax, e-mail, and URL. The application automatically populates the different IDs for these objects (Phone OSR, Fax OSR, and so on).

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Code</td>
<td>The industry code that you retrieved from the application for the classification category that you are using. You can obtain a list of the codes using the Manage Classification Categories task as described in the Viewing Classification Categories for Accounts topic.</td>
</tr>
</tbody>
</table>

6. Click **Create Import Activity**.

7. In the Login dialog, do the following:
   a. Enter the host name. The host name is in the portion of the URL between `https://` and `/sales`.
   b. Enter the user name and password.
   c. Click **Submit**.

8. If the **You must correct errors in your entries** message appears, then:
   a. Click **OK**
      - The Error worksheet displays your errors.
   b. Click each error link in column D and make the correction on the Template worksheet.

   **Note:** After you correct an error, you must click outside the field for the correction to be recognized.

   c. Click **Create Import Activity** and **Submit** again.

9. If the macro data is validated without errors then, the macro displays one of the messages listed in the following table:

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted</td>
<td>Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>successfully.</td>
<td></td>
</tr>
<tr>
<td>Unable to connect to the server at this time.</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>Unable to submit the file import activity.</td>
<td>You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors worksheet to view the error details.</td>
</tr>
</tbody>
</table>

10. If your import activity was submitted successfully, then click **Activity Details**.
    The Activity Details window appears, listing the import activity name, its ID and its status.
    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is **Completed**.

11. Optionally, click **Generate Log** to save a file listing the accounts that were imported.
Validating the Imported Accounts

You can validate the accounts you imported using advanced search in the Accounts work area as follows:

1. Sign in as a salesperson with the Sales Administrator job role. Sales administrators have broad access to sales data.
2. Navigate to the Accounts work area.
3. Click **Advanced Search** (the filter icon highlighted with callout 1 in the following figure).

   The Advanced Search panel appears.

4. From the **Record Set** list select **All records I can see** (callout 2).
5. Add United States or the country you imported as an additional filter (callout 3) as follows:
   a. Click **Add** and select **Country**.
   b. Select the country from the **Country** list.
6. Click **Search**.

   The list of accounts for the country appears. After you import contacts, the primary contact is listed in the list as well.
Entering Data into the Contact Import Macro and Importing

After you import accounts, you can import their contacts. You can import multiple contacts for each account. The first contact you import using the macro automatically becomes the primary contact for the account. Using the macro, you can import up to 1000 contacts at a time.

Note: You can extend the macro to import additional standard and custom fields. If you do, then you must create a new mapping to use in your import. The steps for customizing macros are not covered in this guide.

To populate the macro and import the contacts, do the following:

1. Open the R12 Contact Quick Import Macro.xlsx.
2. Enable macros in Microsoft Excel, if required.
3. The header displays the country code and the default setting is US.
4. Enter the mapping number in the Mapping field.
5. Enter the contact information in the Template worksheet. The following table describes the columns:

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Number</td>
<td>Unique ID for the contact. If you leave this required column blank, then the macro generates the contact number automatically using the date and time when you import. The contact number is used to identify the contact for updates.</td>
</tr>
<tr>
<td>First Name</td>
<td>Contact first name.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Contact last name.</td>
</tr>
<tr>
<td>Job Title</td>
<td>Contact job title.</td>
</tr>
<tr>
<td>Owner ID</td>
<td>Enter the Party ID of the salesperson from the file you exported earlier. Making a salesperson the owner of the contact displays the contact record in the My Contacts list in the Contacts work area for that salesperson. If you do not enter an owner ID, then the user doing the import becomes the owner. Salespeople must search for the contacts or view them from the Accounts work area. They can change ownership when they edit the contact record.</td>
</tr>
<tr>
<td>Work Phone Country Code</td>
<td>Country code for the work phone. If you import a work phone and no mobile phone, then the application displays the work phone as the primary phone in the contact and account UI.</td>
</tr>
<tr>
<td>Work Phone Number</td>
<td>Phone number without spaces.</td>
</tr>
<tr>
<td>Mobile Country Code</td>
<td>Country code for the contact’s mobile phone number.</td>
</tr>
<tr>
<td>Mobile Number</td>
<td>Phone number without spaces.</td>
</tr>
</tbody>
</table>
### Column | What to Enter
--- | ---
E-mail | E-mail address.
Address Location OSR | If the contact has the same address as the account, then enter the Address Location OSR from the account import macro and leave the rest of the address fields blank. If you are entering a separate contact address, then leave this column blank. The macro automatically generates this ID for you when you import.
Address 1 | Enter a street address unless you are using the account address.
Address 2 | Second address line.
Address 3 | This column is hidden in the macro.
City | City.
State | State.
County | This column is hidden in the macro.
Province | This column is hidden in the macro.
Postal Code | Postal code.
Account Number | Copy the account number for the contact’s organization from the Account Number column in the account import macro file.

**Note:** You can extend the macro and the mapping to include both standard and custom fields according to your business needs.

6. Click **Create Import Activity**.
7. In the Login dialog, do the following:
   a. Enter the host name. The host name is in the portion of the URL between https:// and /sales.
   b. Enter the user name and password.
   c. Click **Submit**.
8. If the **You must correct errors in your entries** message appears, then:
   a. Click **OK**
      - The Error worksheet displays your errors.
   b. Click each error link in column D and make the correction on the Template worksheet.

   **Note:** After you correct an error, you must click outside the field for the correction to be recognized.
   c. Click **Create Import Activity** and **Submit** again.
9. If the macro data is validated without errors then, the macro displays one of the messages listed in the following table: Click Submit.

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted successfully.</td>
<td>Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>Unable to connect to the server at this time.</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>Unable to submit the file import activity. Check log for details.</td>
<td>You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors work sheet to view the error details.</td>
</tr>
</tbody>
</table>

10. If your import activity was submitted successfully, then click Activity Details.

The Activity Details window appears, listing the import activity name, its ID and its status.

- If the import activity is still in progress, you can refresh the status periodically by clicking Refresh.
- If your import completed successfully, then the status listed is Completed.

11. Optionally, click Generate Log to save a file listing the contacts that were imported.

Validating the Imported Contacts

You can view the primary contacts of the accounts you imported from the list of accounts. See the Validating the Imported Accounts topic for details. Alternatively, you can view a list of contacts for the country you imported as follows:

1. Sign in as a salesperson with the Sales Administrator job role. Sales administrators have broad access to sales data.
2. Navigate to the Contacts work area.
3. Click Advanced Search (the filter icon highlighted with callout 1 in the following figure).
The Advanced Search panel appears.

**Contacts**

<table>
<thead>
<tr>
<th>Find</th>
<th>Name</th>
<th>List</th>
<th>Advanced Search</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>A</td>
<td>B</td>
<td>C</td>
</tr>
</tbody>
</table>

1. From the **Saved Search** list select **Contact Name** (callout 2).
2. Add United States or the country you imported as an additional filter (callout 3) as follows:
   a. Click **Add** and select **Country**.
   b. Select the country from the **Country** list.
3. Click **Search**.
   The list of contacts for the country appears.

### Entering Data into the Account Hierarchy Import Macro and Importing

Use this procedure to import hierarchies of the accounts you imported using the account import macro. You can create multiple hierarchies in each import with a maximum of 1000 records in all.

Importing a hierarchy requires you to run the import in two steps after you enter your data:

- **Step 1** creates the hierarchy tree root and the hierarchy structure.
  This step uses the predefined mapping provided in the application, so no mapping number entry is required.
- **Step 2** associates the accounts you created with the structure.
  This step uses the mapping you uploaded to your application, so you must provide the mapping number.

The macro provides two separate buttons to initiate these imports. Both imports use the same data you enter into the macro.

To populate the macro and import the account hierarchies:

1. Open the R12 Account Hierarchy Quick Import Macro.xlsx.
2. Enable macros in Microsoft Excel, if required.
3. In Step 2, **Hierarchy Member Mapping** field, enter the mapping number for the R12 Account Hierarchy Member Macro Mapping.
4. For each account hierarchy you want to import, do the following:

   a. Enter the account at the top of the account hierarchy as follows:
      i. Enter the account number from the account import macro in the **Party Number** column.
      ii. Because this account is at the top of the hierarchy, leave the **Parent Party Number** column blank.
      iii. Enter a name for the hierarchy, for example, **Global**. The name is not displayed in the UI and it must be unique in the macro.

   b. For every member of the hierarchy, do the following:
      i. Enter the account number from the account import macro in the **Party Number** column.
      ii. Enter the account number for the parent account in the **Parent Party Number** column.
      iii. Enter the hierarchy name you entered for the top of the hierarchy. For example, **Global**.

The following figure shows the macro populated with a hierarchy of four accounts underneath the same parent account:

The following table lists the entries for the hierarchy example in the figure. The **Parent Party Number** column for the first record is blank.

<table>
<thead>
<tr>
<th>Party Number</th>
<th>Parent Party Number</th>
<th>Hierarchy</th>
</tr>
</thead>
<tbody>
<tr>
<td>AC_ PN_ 170222150805000</td>
<td></td>
<td>Global</td>
</tr>
<tr>
<td>AC_ PN_ 170115010457021</td>
<td>AC_ PN_ 170222150805000</td>
<td>Global</td>
</tr>
<tr>
<td>AC_ PN_ 170115000905012</td>
<td>AC_ PN_ 170112150805000</td>
<td>Global</td>
</tr>
<tr>
<td>AC_ PN_ 170115010457007</td>
<td>AC_ PN_ 170112150805000</td>
<td>Global</td>
</tr>
<tr>
<td>AC_ PN_ 170115010457014</td>
<td>AC_ PN_ 170112150805000</td>
<td>Global</td>
</tr>
</tbody>
</table>
5. In the Step 1 section, click **Create Hierarchy Import Activity**.

6. In the Login dialog, do the following:
   
   a. Enter the Host Name. The host name is in the portion of the URL between `https://` and `/sales`.
   
   b. Enter the user name and password.
   
   c. Click **Submit**.

7. If the **You must correct errors in your entries** message appears, then:
   
   a. Click **OK**

   The Error worksheet displays your errors.
   
   b. Click each error link in column D and make the correction on the Template worksheet.

   ![Note:](image)
   
   After you correct an error, you must click outside the field for the correction to be recognized.

   c. Click **Create Import Activity** and **Submit** again.

8. If the macro data is validated without errors then, the macro displays one of the messages listed in the following table:

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted successfully.</td>
<td>Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>Unable to connect to the server at this time.</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>Unable to submit the file import activity.</td>
<td>You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors work sheet to view the error details.</td>
</tr>
</tbody>
</table>

9. If your import activity was submitted successfully, then click **Activity Details**.

The Activity Details window appears, listing the import activity name, its ID and its status.

   - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
   
   - If your import completed successfully, then the status listed is **Completed**.

   You are now ready to import the association between the hierarchy nodes and accounts.

10. In the **Step 2** section of the macro header, click **Create Hierarchy Member Import Activity**. The Login window appears listing the host name, user name, and password you entered in Step 1.

11. Click **Submit**.

12. You can monitor the progress of your second import activity, the same way you did in step 1.
Validating the Imported Account Hierarchies

You can validate the import and view the hierarchies you imported in the UI. Before validating, you must ensure that you run the account assignment process first. The user doing the validation must be on the account owner, be on the account team, or manage someone who is.

1. Sign in as a salesperson with the Sales Administrator job role. Sales administrators have broad access to sales data.
2. Navigate to the Accounts work area.
3. Search for and open the parent account to edit it.
4. Click the Profile tab.
5. Click the Manage Account Hierarchy link to view the details of the imported account hierarchy members.

The following figure highlights the Manage Account Hierarchy link.
14 Setting Up Sales Campaigns

About Sales Campaigns

Sales campaigns make it easy for salespeople to keep their contacts informed, announce product launches, and invite them to events. You can configure HTML e-mail templates that salespeople can use to send e-mails using Oracle Sales Cloud's built-in e-mail server. The application monitors responses and can create follow-up tasks or send e-mails to the sales campaign owners. The following figure outlines the sales campaign process.

1. Sales administrators create an HTML template referencing images stored separately on a public server.
   
   You can include merge fields, links (URLs), and three predefined response links provided by Oracle. Using the predefined response links, contacts can request a call-back, request more information, or fill out a form to have the e-mail sent to others.

2. Salespeople use the template to create a sales campaign and select the contacts they want to e-mail.

3. For each sales campaign, salespeople can modify the template, add messages for each recipient, and have the application generate follow-up tasks or e-mails.

4. Salespeople can have the sales campaign e-mails sent either immediately after clicking Submit or at the specified date and time.

5. When contacts open the e-mail, click a URL or one of the response links, the application records their responses.

6. The application creates a task for each response or sends a notification e-mail, depending on campaign setup.

7. The sales campaign owner reviews the sales campaign responses and can convert them into leads.
8. Salespeople can review the tasks generated by the sales campaign in the Activities work area.

Sales Campaign Setup Overview

The following table outlines the steps required to set up and test sales campaigns. Details for individual steps are provided in the topics that follow.
Step | Description | Task Name | Where to Get More Details
--- | --- | --- | ---
1 | Create the sales campaign template in a separate HTML editor and then upload the file into the template. You must host the images in your template in a publicly-accessible Web server and reference them using absolute paths in your HTML. You can use the built-in rich text editor for minor edits and to insert the merge fields, tracked links, and response forms. | Manage Marketing Treatment Templates | See the Creating a Sales Campaign Template and Template Editing Options topics in this chapter.
2 | Specify the default sales campaign template salespeople see when they create a sales campaign. Salespeople can browse and select additional sales campaign templates. | Manage Marketing Profile Options | See the Specifying the Default Sales Campaign Templates topic in this chapter.
3 | Test the template by creating a sales campaign and setting yourself up as a contact. Review the e-mail and respond by clicking the links. Review the results. | Navigate to the Sales Campaign work area and create the sales campaign. | See the Testing Sales Campaign Setup topic in this chapter.

Creating a Sales Campaign Template

Sales administrators can create templates that salespeople can use and edit for their sales campaigns. You can create a sales campaign template either from scratch or by copying one of the predefined templates provided by Oracle.

To create a sales campaign template, do the following:

1. While signed in as a setup user, open the Manage Marketing Treatment Templates task from the implementation project. Alternatively, search for the task by name in the Setup and Maintenance work area.

   The Manage Marketing Treatment Templates page appears listing the available templates.

2. If you want to use an existing template as your starting point, then do the following:
   a. Click the template name link and then select Duplicate from the Actions menu.

      The application copies the template.
   b. Select the template copy and click Edit.

      The Edit Treatment page appears.

3. If you want to create a template from scratch instead, then click Create.

   The Create Template page appears.

4. In the Name field enter the template name salespeople see while creating a sales campaign.
5. You can use some of the other fields at the top of the page for the following:
   - Upload an HTML file to serve as the basis of your e-mail body using the **Upload File** field. Uploading a file replaces the current template content.
     - Any images must be hosted on a public server and include their absolute URLs in the `src` tags. The HTML you upload must contain only the body of the HTML document. You omit the header information.
     - The rich text editor provided in the UI is not an HTML editor, so you are better off creating your template outside the application. For example, you cannot use the rich text editor to insert images. You must insert image URLs in the HTML directly.
   - Remove a template from use by deselecting the **Active** option.

6. Edit the e-mail body.

The following table explains some of the editing options available on the page. The callout numbers refer to locations in the figure which follows.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Editing Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click <strong>Source</strong> to switch between the rich text editor and the raw HTML. You can use the raw HTML view for pasting in HTML that you have prepared in another editor, but the raw HTML is displayed in one block.</td>
</tr>
<tr>
<td>2</td>
<td>Use the rich text editor toolbar for editing text, for inserting URLs that are automatically tracked by the application when contacts click on them, and for other minor changes. URLs for images in the template must be inserted into the HTML itself.</td>
</tr>
<tr>
<td>3</td>
<td>Use the help icon to access the user guide for the rich text editor. The editor is a separate product licensed by Oracle and not all of its features are supported.</td>
</tr>
<tr>
<td>4</td>
<td>Use the first row of buttons, the Element buttons, to insert merge fields and links the e-mail recipients can click to request more information, request a follow-up call, or forward the information to friends.</td>
</tr>
<tr>
<td>5</td>
<td>Use the second row of buttons to insert content which appears in the e-mail only when the conditions you specify are met. For example, you can insert different blocks of text for e-mails to different cities.</td>
</tr>
</tbody>
</table>
7. Click **Save and Close**.

## Template Editing Options

### Inserting Links for a Call Back, for More Information, and for Forwarding to Others

You can insert three predefined links that e-mail recipients can click to indicate that they want a callback, receive more information, or have the e-mail sent to others. The application automatically tracks the responses and can create follow-up tasks or send e-mail reminders.

#### Request Call Back and Request More Information

When an e-mail recipient clicks the **Request Call Back** or the **Request More Information** links, the browser displays a simple message: *Thank you for your interest. Your request has been received and you will be contacted shortly.* At present, the contents of the message cannot be changed.

#### Forward to Friend

Clicking the **Forward to Friend** link displays a browser window where the contact can enter the names and e-mail addresses of up to four recipients and an optional message. Oracle Sales Cloud sends the sales campaign e-mail to the recipients. The forwarding message is displayed wherever the template designer inserted the `${Standard.ForwarderMessage}` merge field.
The following figure shows a screen capture of the Forward to a Friend window. It includes a text field for entering a personal message, and fields to enter the names and e-mail addresses of four friends.

Enter a personal message (*optional*)

Enter your friends’ names and corresponding e-mail addresses here:

First Name:
Last Name:
Email Address:

First Name:
Last Name:
Email Address:

First Name:
Last Name:
Email Address:

First Name:
Last Name:
Email Address:

Click to Send

If the new recipients respond, they are automatically created as contacts in the application.

**Adding the Predefined Response Links to the Template**

To insert one or more of the predefined response links, do the following:

1. While editing the template in the rich text mode, place your cursor at the location where you want the link to appear.
2. Click the **Element** combo box and select **Response Forms** from the list.
3. Click the adjacent **Element** combo box and select one of the valid three options:
   - Forward to Friend
   - Request Call Back
   - Request More Information

4. Click **Insert** on the same row.

   The application displays the link.

5. If you inserted Forward to Friend, then you must also insert the merge field that displays the forwarding message:
   - Place your cursor at the location in the template where you want the forwarding message to appear.
   - Click the **Element** combo box and select **Merge Fields** from the list.
   - Click the adjacent combo box and select **Standard**.
   - Click the third combo box and select **Forwarder Message**.
   - Click **Insert** on the same row.

   The application displays the merge field `${Standard.ForwarderMessage}` in the template.

### Inserting Personalized Text and Other Merge Fields

You can insert merge fields to display contact and sales campaign attributes and to enable the manual entry of personalized text to each recipient. To insert the personalized text merge field and other merge fields, do the following:

1. While editing the template in the rich text mode, place your cursor at the location where you want the merge field to appear.
2. Click the **Element** combo box and select **Merge Fields** from the list.
3. Click the adjacent combo box and select the merge field category:
   - Contact
   - Campaign
   - Standard

   The standard category includes the **Personalized Text** merge field, which permits the entry of personalized text for recipients, and the **Forwarder Message** merge field for use with the **Forward to Friend** link. The Forwarder Message merge field displays the message entered by a contact after they click the link.

4. Click the next combo box and select the merge field.
5. Click **Insert** on the same row.

   The application inserts the merge field in the text.

### Inserting URLs Into Sales Campaign Templates

The application automatically tracks clicks on the URLs you insert into sales campaign templates. You must use the enter link function in the rich text editor or insert a URL in the HTML directly.

If you are inserting the URL into the HTML directly, then it must be tagged correctly. Here is an example:

```html
<a href="http://oracle.com">Oracle</a>
```
Adding Conditional Content

Conditional content provides the ability to present relevant information to individual email recipients without having to create multiple messages. There are two ways to generate conditional content within a sales campaign template:

- Block statement personalization
- If-Then-Else personalization

Conditional content and merge fields are available in both HTML and Text format emails.

Block Statement Personalization

Blocks determine whether to insert a block of text or HTML into an outgoing email by comparing one string to another:

- If the two strings are identical, the block is inserted.
- If the two strings are not identical, the block is not inserted.

**Note:** The string comparison is case sensitive.

The following table lists components of the block personalization element.

<table>
<thead>
<tr>
<th>Personalization Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$(DefineBlock &quot;MatchString&quot;)</td>
<td>Starts a block of text or HTML that is inserted in place of an Insert Block component when MatchString is identical to the MatchString of the Insert Block component.</td>
</tr>
<tr>
<td>$(EndBlock)</td>
<td>Ends a block of text or HTML that was started with the Define Block component.</td>
</tr>
<tr>
<td>$(InsertBlock &quot;MatchString&quot;)</td>
<td>A block of text or HTML is inserted at the location of this component when MatchString is identical to the MatchString of a Define Block component.</td>
</tr>
</tbody>
</table>

The following is an example of a block personalization element:

```
You live in $(InsertBlock "${Account Country}").
$(DefineBlock "USA") <B>the United States.</B>
$(EndBlock)
$(DefineBlock "India") <B>India</B>
$(EndBlock)
```

In this example, if USA is entered in the Country field of the Account record, the following sentence appears:

```
You live in the United States.
```

If a given recipient has no associated value for a block variable listed in the `InsertBlock MatchString` component, then nothing is inserted into the message for that block.

Inserting a Block Statement

To insert a block statement, do the following:

1. Display the email template in the HTML editor.
2. Place the cursor in the location where you want the insert the block.
3. Create the Insert Block statement as follows:
   - In the editor toolbar, select Insert Block from the rule conditions drop-down list.
   - In the next drop-down list, select the record the field comes from: Contact, Account, or Campaign.
   - In the next drop-down list, select the field in the record.
   - Click Insert.
4. Create a Define Block component as follows:
   - In the drop-down list immediately above the email tag, select Create Block.
     A $(DefineBlock "") and $(EndBlock) statement appear in the text.
   - Type a field value within the quotation marks of the $(DefineBlock "") statement.
     This is the value that drives the content displayed in the block.
   - Type the text that you want to insert into the email between the $(DefineBlock "") and $(EndBlock) tags.
5. Repeat Step 4 until you have added all the Define Block components that you need.

If-Then-Else Personalization
If-Then-Else personalization provides the ability to insert or remove text within your email content, based on whether a Merge field value is defined. The merge field is defined if it contains a value or, for numeric merge fields, if the value is not 0 (zero).
   - If the merge field is defined, the text remains in the outgoing email.
   - If the merge field is not defined, the text is removed from the outgoing email.

The following table lists components of the If-Then-Else personalization element.

<table>
<thead>
<tr>
<th>Personalization Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$(if {Record.FieldName})</td>
<td>The If component is used to start an If-Then-Else personalization element. It determines whether the merge field named [FieldName] has a value. If there is a value for [FieldName], the text between this If-Then-Else component and the next If-Then-Else component is not removed from the email.</td>
</tr>
<tr>
<td>$(elseif {Record.FieldName})</td>
<td>Ends a block of text or HTML that was started with the Define Block component.</td>
</tr>
<tr>
<td>$(else)</td>
<td>The Else component is used after a $(if) or $(elseif) component. If the preceding $(if) or $(elseif) component removes the preceding block of text or HTML from the email, the $(else) component’s block of text or HTML is included in the email. If the preceding $(if) or $(elseif) component does not remove it’s block of text or HTML, the $(else) component’s block of text or HTML is not included in the email.</td>
</tr>
<tr>
<td>$(endif)</td>
<td>The End-If component closes the If-Then-Else personalization element.</td>
</tr>
</tbody>
</table>

The following is an example of an If-Then-Else personalization element:

$(if ${Contact.First Name})
  Dear ${Contact.First Name}${Contact.Last Name},
$(else)
  Dear Mr. or Ms. ${Contact.Last Name},

$(endif)

- If the Contact.First Name field is defined, the email begins with “Dear First Name Last Name”.
- If the Contact.First Name field is not defined, the email begins with “Dear Mr. or Ms. Last Name”.

You can use If-Then-Else statements similarly to block statements, by including operators such as Equal to, Starts with, or Contains. You can select these operators from a drop-down list when you generate If or If-Else statements. Unlike blocks, this permits you to insert conditional content where the variable is true or not true.

For example, to modify the email with a condition for accounts in the state of California, you use the following statement:

$(if ${Account.Bill to State} == "CA") Join us all month long for special events and workshops held in each of our California locations.
$(else) Join us all month long for weekly online workshops and special offers at www.mycompany.com/events.
$(endif)

You can also nest If-Then-Else statements, placing one within another.

**Note:** The components of personalization elements must be placed in the correct locations in the text. Any incorrect placement causes an error.

### Inserting an If-Then-Else Personalization Statement

To insert an If-Then-Else statement, do the following:

1. Display the email template in the HTML editor.
2. Place the cursor in the location where you want the If-Then-Else statement.
3. Create the If or ElseIf statement as follows:
   - In the editor Toolbar, from the drop-down list, select either If or ElseIf.
   - In the next drop-down list, select the record the field comes from: Contact, Account, or Campaign.
   - In the next drop-down list, select the field in the record.
   - In the next drop-down list, select the operator.
   - In the next text box, enter the value that the field is compared with.
   - Click Insert.
4. Below the If or ElseIf statement, enter the text that appears if the condition in the statement is satisfied.
5. At the end of the entire If-Then-Else statement, enter $(endif).

### Related Topics

- Sales Campaign Content: Explained
- How Standard URLs and Marketing Content Fit Together

### Specifying the Default Sales Campaign Template

Use this procedure to specify the default sales campaign template. Salespeople can select any of the other active templates when creating sales campaigns.

1. From the implementation project, open the Manage Marketing Profile Options task. Alternatively, you can search for this task in the Setup and Maintenance work area.
The Manage Marketing Profile Options page appears.

2. Enter Allow Treatment Template in the Profile Display Name field.
3. Click Search.
4. Select the profile in the search results and select the default template from the Profile Value list.
5. Click Save and Close.

Testing Sales Campaign Setup

You can test your template and the rest of your sales campaign setup by following the steps in this topic. To test sales campaigns, you:

1. Create a sales campaign using the template you created and create yourself or others in the implementation team as contacts.
2. Review the e-mail sent by the campaign and respond by clicking one or more of the response links. Your e-mail client must allow remote content if you want the sales campaign register that you opened the e-mail. You can enable allow remote content in messages either message by message or through a global setting. The remote client setting does not affect the recording of the other responses in the body of the e-mail.
3. Navigate back to the Sales Campaign work area and review the responses. You can review any tasks that were automatically generated by navigating to the Activities work area.

Creating the Test Sales Campaign

1. Sign in using a test account you created for a sales manager or a salesperson.
2. Navigate to the Sales Campaigns work area.
3. Click Create Campaign.

The Create Sales Campaign: Select Contacts page appears. This page is the first of three in the sales campaign creation process.

The following figure shows a screen capture of a portion of the Create Sales Campaign: Select Contacts page highlighting the Add Contacts button.

4. Because this is a test, you must first create yourself or other members of the implementation team as contacts at one of the accounts:
   a. Click the Add Contacts button highlighted in the figure.
      The Add: Contacts page appears.
The following figure shows a partial screen capture of the Add: Contacts page. Callout 1 shows the location of the Record Set field where you select an operator and the record set. Callout 2 points to the location of the Create Contact button.

On the Add Contacts page, you can select contacts from previous campaigns, search for contacts by name, or create contacts.

If you search for existing contacts by name, consider selecting a broad record set from the Record Set list.

b. Click Create Contact.

The Create Contact page appears.

c. Enter the test contact name and e-mail address.

d. Optionally, select an account.

e. If your template includes merge fields from the contact address, then you must enter the address or select the Use Account Address option.

f. Click Save and Close.

The Add: Contact page now shows the contact you created.

5. Select the Select option.

6. Click Apply to add the contact to the sales campaign and continue adding other contacts, or, if you are done, click OK.

You are returned to the Create Sales Campaign: Select Contacts page which now lists the contacts you selected.

7. Click the right arrow or the Design E-Mail link.

The Create Sales Campaign: Design E-Mail page appears showing the campaign template you selected as the default.

8. The From field displays the sender’s e-mail address. You can edit the address to show the recipient name, for example: George White <george.white@oracleleads.com>.

9. In the Subject field, enter the e-mail subject the recipients see.

10. You can modify the e-mail body text using the rich text editor. The following table explains additional actions.
### What You Can Do

<table>
<thead>
<tr>
<th>What You Can Do</th>
<th>How to Do It</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select a different template</td>
<td>Click <strong>Actions</strong>, select <strong>Change Template</strong> and scroll through the thumbnails of the available templates.</td>
</tr>
<tr>
<td>Insert contact merge fields</td>
<td>Click <strong>Insert Elements</strong> and select <strong>Merge Fields</strong> from the <strong>Show</strong> list.</td>
</tr>
</tbody>
</table>

**Add the Personalized Text or Forwarded Message merge fields.**

- The **Personalized Text** merge field lets you enter personal text for each recipient. The **Forwarder Text** merge field displays any text the e-mail recipient enters after clicking the **Forward to Friend** link.

<table>
<thead>
<tr>
<th>What You Can Do</th>
<th>How to Do It</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add additional response forms, the links recipients</td>
<td>Click <strong>Insert Elements</strong> and select <strong>Response Forms</strong> from the <strong>Show</strong> list.</td>
</tr>
<tr>
<td>can click to request a call-back, request more</td>
<td></td>
</tr>
<tr>
<td>information, or have the e-mail sent to others.</td>
<td></td>
</tr>
</tbody>
</table>

11. If the e-mail body includes the Personalized Text merge field, \${Standard.PersonalizedText}, then you can enter personalized text to any of the recipients as follows:

   a. Click **Actions** and select **Personalize Message**.

      The Personalize Message window appears.

   b. Click **Personalize** for a recipient.

   c. Enter the text in the Personalize Message window.

   d. Click **OK**.

   e. Click **Done** after you enter all of the personal messages.

   The text appears in the e-mail wherever you inserted the \${Standard.PersonalizedText} merge field.

12. Click the right arrow or select **Wrap Up** link to display the Create Sales Campaign: Wrap Up page.

13. In the **Name** field, enter the campaign name. This name identifies the campaign in the list of campaigns and in follow-up actions, e-mails, and leads.

14. If you inserted one of the response forms or if the template includes a URL, then in the My Follow-Up Actions region, select either Create Call Back Task or Receive E-Mail Notification.

15. In the Launch Date region, you can leave the **Immediately** option selected.

16. Click **Submit**.

   The application returns you to the Sales Campaign work area page where you can search for campaign or view campaign lists.

17. You can see if the campaign has completed by selecting the **My Completed Campaigns** list.

### Review Responses

1. While still signed in as the campaign creator, display the **My Completed Campaigns** list and click the campaign name link in the Sales Campaign work area.
The campaign does not appear on this list until after the e-mails are sent. If you want to view the current status of the campaign in progress, then you must search for it by name.

The Sales Campaign Summary page appears showing the responses for the campaign, including the number of contacts who opened the e-mail. The **Opened E-Mail** statistics counts only those contacts who allowed remote content when they opened the e-mail.

The following figure shows a partial screen capture of the Sales Campaign Summary page.

2. Click the individual statistics in the Customer Responses column to display more details and the individual contact names.

3. Click the **Responses** tab to review the details of all the responses.

   The tab shows the names of the responders, their accounts, the type of response (such as a call-back request), the response dates, and e-mail review statuses.

   If you included the Forward to Friend response form in your sales campaign, and the e-mail was sent to additional individuals who responded, then these individuals are created as standalone contacts.

4. From the **Responses** tab, you can convert the responses to sales leads by selecting the response and clicking **Convert to New Lead**. The converted leads are displayed in the **Leads** tab.

5. If you specified that you wanted a task to be created based on a response, then:

   a. Navigate to the **Activities** work area.

   b. Click the **My Tasks** tab.

      The tab lists the tasks created from the campaign. These task subjects are: Sales Campaign Response Generated Task.

   c. Click the **Sales Campaign Response Generated Task** link to view the task details. All of the tasks are the same unless you added your own fields to the task page to display the campaign name.
15 Setting Up Sales Territories and Assignment

Setup Overview

You set up sales territories to assign the right people to manage accounts and opportunities and to enable forecasting. Read the About Setting Up Sales Territories and Assignment topic and complete the setup tasks outlined in the following table. You can open these setup tasks from the Set Up Sales Territories folder in the implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>If you are setting up territories based on geography, like Vision Corporation, then you must enable the geographical elements that you plan to use during territory setup.</td>
<td>Manage Territory Geographies</td>
<td>See the Specifying Geography Elements for Territory Setup topic in this chapter for details.</td>
</tr>
<tr>
<td>2</td>
<td>Enable the territory dimensions you plan to use in your territories.</td>
<td>Enable Dimensions and Metrics</td>
<td>See the Enabling Territory Dimensions topic for details.</td>
</tr>
<tr>
<td>3</td>
<td>Create a territory proposal. A proposal is a sandbox that permits you to update territories without affecting any existing territory setup.</td>
<td>Manage Territory Proposals</td>
<td>See the Creating a Territory Proposal topic for details.</td>
</tr>
<tr>
<td>4</td>
<td>Create the hierarchy of sales territories in the proposal starting with the top territory and working your way down.</td>
<td>Manage Territory Proposals</td>
<td>See the Creating the Sales Territory Hierarchy topic for details.</td>
</tr>
<tr>
<td>5</td>
<td>Activate the territory proposal.</td>
<td>Manage Territory Proposals</td>
<td>See the Activating the Territory Proposal topic for details.</td>
</tr>
<tr>
<td>6</td>
<td>Optionally, enable automatic assignment of territories to opportunities when they are updated.</td>
<td>Manage Opportunity Profile Options</td>
<td>See the Making Opportunity Assignment Automatic topic for details.</td>
</tr>
</tbody>
</table>

By default, the application automatically assigns sales territories to accounts whenever an account is created or updated, but sales users must trigger opportunity assignment manually while editing an opportunity or wait for the opportunity assignment process to run.
Oracle sets manual assignment for opportunities as the default behavior to prevent performance issues for companies with large number of opportunities (100,000 and up).

If your organization, like Vision Corporation, does not have such a large volume, you can have the application assign the opportunity automatically by setting the profile Assignment Submission at Save Enabled to Yes. A setting of Yes is also recommended for forecasting.

7 Run the account and opportunity assignment processes (Request Account Assignments and Revenue Territory Territory Based Assignment) immediately after setting up sales territories and on a regular schedule, perhaps once every day during off-peak hours.

- Request Account Assignments Process
- Request Revenue Territory Based Assignment

See the Running the Account Assignment Process and the Running the Assignment Process for Opportunities topics for details.

About Setting Up Sales Territories and Assignment

This chapter discusses how to set up sales territories and use those sales territories to automatically assign salespeople to sales teams on accounts and opportunities. Sales territories are the primary way of assigning salespeople to accounts and opportunities and are a required prerequisite for the forecasting setup described in a later chapter.

Assignment Methods

There are two ways of automatically assigning salespeople to sales teams in Oracle Sales Cloud:

- By setting up sales territories

You can set up the sales territory boundaries based on a wide variety of factors, called dimensions. The most common dimensions include geography, products, customer size, customer type, and industry.

When you assign salespeople using territories, the territories themselves become associated with the account, opportunity, or lead. If you later realign your sales territories or if there is a turnover in your sales organization, then the assignments reflect those changes automatically after you run the assignment process.

- By creating assignment rules

Rules assign the individual salespeople you specify to sales teams if the rule conditions are met. Rules are the primary way of assigning salespeople to leads, and so rule setup is covered in the Setting Up Leads chapter. For opportunities, you can create rules to assign additional salespeople using factors that are not covered by sales territories, such as deal size or product knowledge. Creating rules to supplement territory assignment requires
additional setup, including the setting of system profile options not covered in this guide. See the Oracle Sales Cloud Implementing Sales guide for details.

Salespeople can trigger assignment manually or you can assign leads, accounts, and opportunities automatically by running assignment processes.

How Assignment Affects Data Visibility

While all resources in your sales organization can view basic account information, including customer names, contacts, and addresses, they cannot automatically edit that information and they do not have access to opportunities, forecasts, or activities. In Oracle Sales Cloud, you gain edit access to sales data in one of three ways:

- You are a member of the sales team on the object or a member of a territory assigned to the object
- You manage someone who is on the sales team

Managers in a salesperson’s management hierarchy have automatic visibility to their team’s set of accounts, contacts, leads and other information. They don’t have to be explicitly assigned to each territory or sales team.

- You are a sales administrator (a user with the Sales Administrator job role).

Sales administrators have access to everything.

Here is a summary of the access provided assigning a resource for each object:

- **Leads**
  Assignment makes it possible for you to view and edit leads. Leads are only visible and editable by the lead owner, the members of the sales team, the person imports leads, their managers, and the sales administrator.

- **Accounts**
  Sales team assignees can share all the details they need to collaborate, including customer interactions, to-do lists, and appointments. Assignees participate in social discussions, share collateral, and collaborate on presentations.
  
  If you implement Outlook or Mobile, then only the accounts that are part of a salesperson’s territory are downloaded when synchronizing.

- **Opportunities**
  You must be assigned to an opportunity (or be in the management chain for someone who is), to view and update opportunities and their revenue lines, and to submit forecasts.

About Defining Sales Territory Boundaries

The sales territory boundaries are defined by the values you assign to their dimensions. Different dimensions are available for defining territories for assigning accounts and for opportunities. For example, you can classify accounts by industry, so you can define territories using the industry dimension. By contrast, opportunities include a customer’s product interest information but don’t include the industry, so you can’t assign opportunities by industry.

For accounts, the territory dimensions include:

- Geography
- Account type
The account type designates the customer designated as named or not named. This dimension is only available for customer-centric territories.

- Customer size
- Industry
- Organization type

You can also create classification categories to define up to three additional dimensions.

Because opportunities must be associated with an account, you can use the account dimensions to assign opportunities as well. Opportunities have these additional dimensions:

- Business unit
- Product
  - Product groups or individual products from the sales catalog.
- Sales channel
  - The available sales channels are Direct, Indirect, and Partner.

Although opportunities don’t include the customer’s address, opportunities are always attached to an account, so you can use the account address for assignment.

How Territory Assignment Works and the Importance of a Catchall Territory

Sales territory assignment matches the records you are assigning to the territories from the leaf territories up until a match is found. Because some of the values required for assignment may be missing or you may introduce gaps in your territory coverage, you must set up a catchall territory with Any as the value for all of your territory dimensions. The value of Any means that any value, even a missing value, is a match. The owner of the catchall territory, or another user you assign as a territory member, must monitor the catchall territory for records that did not get assigned properly. You can adjust your territory structure over time to minimize the number of records assigned to the catchall territory.

Consider a company that’s assigning opportunities and accounts in the US by geography and product, a very common scenario, and that the company divides the US into two regions: East and West. In each office, one salesperson sells laptops, and a second salesperson sells servers.

The sales territory setup consists of the territories with the dimension values listed in the following table:

<table>
<thead>
<tr>
<th>Territory</th>
<th>Geography Dimension</th>
<th>Product Dimension</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Sales</td>
<td>Any</td>
<td>Any</td>
</tr>
<tr>
<td>West</td>
<td>US West</td>
<td>Any</td>
</tr>
<tr>
<td>East</td>
<td>US East</td>
<td>Any</td>
</tr>
<tr>
<td>West Laptops</td>
<td>US West</td>
<td>Laptops</td>
</tr>
<tr>
<td>West Servers</td>
<td>US West</td>
<td>Servers</td>
</tr>
<tr>
<td>East Laptops</td>
<td>US East</td>
<td>Laptops</td>
</tr>
</tbody>
</table>
The following figure shows a diagram of the sales territory hierarchy listed in the table. Notice that the US Sales territory, the first territory at the top of the hierarchy, highlighted by callout 1, has a value of Any for both the product and the geography dimensions. US Sales is the catchall territory designed to catch any opportunities, accounts, and leads that do not have the correct values to be assigned to any of the other territories.

Consider how the assignment works for different types of records:

- An account with an address in the western US
  
The application starts matching the territories from the leaf territories up. Accounts don't have products, so account assignment ignores the product dimension and assigns both West Laptops and West Servers.

- An account with an address that's not a valid US address
  
  None of the geography territory values match the invalid address, so the account gets assigned to the first territory with Any in the geography dimension: US Sales, the catchall territory.

- An opportunity for an account in the eastern US for laptops
  
The application uses the account location and matches the opportunity to the East Laptops territory.

- An opportunity for servers with an address that’s not a valid US address
  
  Servers matches both the West Servers and East Servers territories, but there are no geography matches. The application assigns the opportunity to the US Sales catchall territory.

- An opportunity in western US for a service or another product that isn’t specified in territories, in the western US
There is no territory with support as the product, so the application assigns the opportunity to the West territory.

Vision Corp. Use Case

The following figure shows the Vision Corp. organization chart. Vision Corp. creates sales territories for everyone in the field sales organization from Martin Conway down, with the exception of the sales administrator and the two inside sales representatives. Although the inside sales representatives are managed by a field sales manager, they are not assigned to sales territories. The two inside sales representatives qualify leads assigned to them using rules you set up as part of the Setting Up Leads chapter.

Vision Corp. sells only to one country, the United States, and divides the country into three geographic regions: west, central, and east. Each sales territory is owned by one field salesperson (although you can assign multiple salespeople, if required).
Recently, Vision Corp. introduced a new line of servers, called Green Servers. The company is assigning an additional field salesperson in each region to help sell the new servers.

The diagram in the following figure shows the sales territory setup with the territory owners. Because Vision Corp. is using territories for forecasting as well, it makes sure that the territory hierarchy mirrors the management hierarchy.

Whenever a new account or opportunity is created or updated, or when a lead is qualified, Vision Corp. has the application automatically check the territories to see who must be assigned. Here’s how the assignment works:

- The application assigns an account to the prime salesperson using the geography dimension (the state the account is located in).
- The application assigns an opportunity or a qualified lead for any product to the prime salesperson in each geographical territory.
- When an opportunity, or a qualified lead, includes a line item for green servers, the application assigns the additional salesperson’s overlay territory to the opportunity or qualified lead.

Vision Corp. sets up the sales territories from the top down as described in this chapter. The following table lists the key entries in the setup.

Note the following:

- The default value of Any for a product dimension means that any value matches the territory.
- Vision Corp. is organizing the 50 states in the US into three geographical regions: East, Central, and West.
- The entries in the Product dimension column are the product groups in the sales catalog. Selecting a product group includes all the product groups and products nested within the product group.
- A value of Revenue in the Forecast Participation column permits the salesperson to create a forecast that’s counted as part of the projected revenue. A value of Nonrevenue means that the owner of the overlay territory can forecast the same revenue as the owner of a prime territory, but the amount for the overlay territory isn’t added to the overall forecast. (If overlay forecasts were included, they would duplicate the revenue projections)
- Managers get a value of Revenue and Nonrevenue in the Forecast Participation column, so they can adjust the forecasts for both prime and overlay territories.
<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Territory Owner</th>
<th>Territory Type</th>
<th>Geography</th>
<th>Product</th>
<th>Forecast Participation</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Product Sales</td>
<td>Martin Conway</td>
<td>Prime</td>
<td>Any</td>
<td>Any</td>
<td>Revenue and Nonrevenue</td>
</tr>
<tr>
<td>East</td>
<td>Michael Rhodes</td>
<td>Prime</td>
<td>Arkansas and all the other states in the eastern US</td>
<td>Any</td>
<td>Revenue and Nonrevenue</td>
</tr>
<tr>
<td>East All Products</td>
<td>Kristen Garrity</td>
<td>Prime</td>
<td>Arkansas and all the other states in the eastern US</td>
<td>Any</td>
<td>Revenue</td>
</tr>
<tr>
<td>East Green Server Overlay</td>
<td>Sean Goodkin</td>
<td>Overlay</td>
<td>Arkansas and all the other states in the eastern US</td>
<td>Green Servers</td>
<td>Nonrevenue</td>
</tr>
<tr>
<td>Central</td>
<td>Alex Smith</td>
<td>Prime</td>
<td>Illinois and all the other states in the central US</td>
<td>Any</td>
<td>Revenue and Nonrevenue</td>
</tr>
<tr>
<td>Central All Products</td>
<td>Peter Branch</td>
<td>Prime</td>
<td>Illinois and all the other states in the central US</td>
<td>Any</td>
<td>Revenue</td>
</tr>
<tr>
<td>Central Green Server Overlay</td>
<td>Marilyn Richie</td>
<td>Overlay</td>
<td>Illinois and all the other states in the central US</td>
<td>Green Servers</td>
<td>Nonrevenue</td>
</tr>
<tr>
<td>West</td>
<td>Mateo Lopez</td>
<td>Prime</td>
<td>Alaska and all the other states in the western US</td>
<td>Any</td>
<td>Revenue and Nonrevenue</td>
</tr>
<tr>
<td>West All Products</td>
<td>Lisa Jones</td>
<td>Prime</td>
<td>Alaska and all the other states in the western US</td>
<td>Any</td>
<td>Revenue</td>
</tr>
<tr>
<td>West Green Server Overlay</td>
<td>Julian Henderson</td>
<td>Overlay</td>
<td>Alaska and all the other states in the western US</td>
<td>Green Servers</td>
<td>Nonrevenue</td>
</tr>
</tbody>
</table>

The application matches territories to accounts and opportunities from the bottom of the hierarchy up. For example:

- An account in Illinois is assigned the Central territory.
- An opportunity for the Illinois account with a Green server line item is assigned the Central territory as well as the Central Green Server Overlay territory.

Preparing to Create Territories
Specifying Geography Elements for Territory Setup

This task is required only if you are creating territories with geography as one of the dimensions. For example, if you are creating territories based on states, you must enable the states for selection during territory creation.

In an earlier step, you imported the reference geography for the countries where you do business. Now you must specify which of those geography elements you want to use in your sales territories. Vision Corp. is creating territories by states, so it enables states.

Optionally, you can organize the geographies into zones to simplify territory creation. Vision Corp., in our example, imported just one country, the US, and plans just three geographical territories: West, Central, and East.

Vision has two options:

- To enable states only
  
  Each territory requires the entry of the states it covers. For example, you must enter all the western states in the West territory, the central states in the Central territory, and so on.

- To enable the states and create zones to organize them
  
  If you organize the states in zones, you can then select the zone in each territory rather than entering the individual states. For example, if you create a West zone and add all the western states, then you can select the West zone for the West territory instead of the individual states.

Vision Corp. foregoes zones and enables states only. When building the territory hierarchy, you copy the existing territories and modify them. The individual states you entered are copied as well.

To specify which geography elements you want to use for sales territories:

1. While signed in as a setup user, open the Manage Territory Geographies task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.

   The Manage Territory Geographies page appears.

2. In the Zones Hierarchies region, select Add Geography from the Actions menu.

   The Add Geography page appears.

3. Open the Country list and click Search.
The following figure shows a partial screen capture of the Add Geography page with the Country list open. The Search link appears in the list.

4. In the Search and Select Country window, search for the country, select it, and click **OK**.
5. Click **Search**. The geographies belonging to the country appear in the Add Geography page.
The following figure shows a screen capture of the Add Geography page listing the geography types for the US.

6. Select the country and click **Submit**.
7. In the Confirmation window, select the **Add geography and include selected children** option.
8. Select the geography elements you want to use in territories. For Vision Corp, this is **State**.
The following figure shows a screen capture of the Confirmation window with the Add Geography and Include Selected Children and the State options selected.

9. Click OK.
10. Click OK again in the batch process confirmation box.
11. Click OK.

Enabling Sales Territory Dimensions

You must enable the territory dimensions that you will use to create your sales territories. Make sure you have all the source data available before you start. Vision Corp. plans to enable the Product and Geography dimensions, so it has completed the sales catalog and territory geography setup.

To enable the territory dimensions, do the following:

1. While signed in as a setup user, open the task **Enable Dimensions and Metrics** from the implementation project.

   The Enable Dimensions and Metrics page appears.

2. Click Edit.
The Edit: Enable Dimensions and Metrics page appears. The following figure shows a screen capture of a partial page highlighting the location of the Select and Add button.

### Edit: Enable Dimensions and Metrics

**Process Status**  Not started

<table>
<thead>
<tr>
<th>Dimensions</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Primary</strong></td>
<td><strong>Dimension Name</strong></td>
</tr>
<tr>
<td>Customer Priorities</td>
<td>Account Priorities</td>
</tr>
<tr>
<td>Geography</td>
<td></td>
</tr>
<tr>
<td>Product</td>
<td></td>
</tr>
<tr>
<td>Sales Channel</td>
<td></td>
</tr>
</tbody>
</table>

3. In the Dimensions region, click **Select and Add**.

   The Select and Add: Dimensions window appears.

4. Select the dimensions that you want to use and click **OK**. Vision Corp. adds **Geography** and **Product**.

5. From the Actions menu, select **Load and Activate**.

   **Note:** If you are activating the Product dimension, then, before clicking Load and Activate, check to make sure you ran the Refresh Denormalized Product Catalog Table for BI process as described in the Setting Up Your Sales Catalog chapter.

You can click **Refresh** to refresh the status. When the process completes successfully, you can start defining territories in the application.

For more information about enabling dimensions, see the Define Territory Management Configuration chapter in the Oracle Sales Cloud Implementing Sales guide.

---

**Creating the Sales Territory Hierarchy**
Creating a Territory Proposal

Use this procedure to create a territory proposal. A territory proposal is the sandbox where you create the sales territory hierarchy.

1. While signed in as a setup user, open the task Manage Territory Proposals from the implementation project.

   The Territories page appears.

2. Click the Manage Territory Proposals Task link.

3. In the Current Territory Proposals region, click Create (the plus sign icon).

   The Create Territory Proposal window appears.

4. Enter a name for the proposal.

5. Leave the Activation Date field blank. This will cause the proposal to be activated immediately after you build your territories.

   Note: Entering a future activation date requires you to run the Run Territory Proposal Activation process. See the Implementing Sales guide for more details.

6. Click Save and View.

   Your territory proposal opens and you can start building your territory hierarchy.

Creating the Sales Territory Hierarchy

With your territory proposal open, create the sales territory hierarchy starting with the top territory in the hierarchy. For each territory you create, you enter the name of the salesperson or manager who owns the territory and the values for the dimensions that form the territory boundaries. When you create child territories, the application automatically copies all the dimension values from the parent territories to speed up entry.

Creating the Top of the Hierarchy

To create the top of the sales territory hierarchy, do the following:

1. In the Territories region of your territory proposal, click Create.

   The Create Territory page appears.

2. Enter the territory name, for example, Product Sales.

3. Select an owner for the top territory, most likely the VP of Sales:

   a. From the Owner list, select Search
   b. Search for the resource name using any of the criteria.
   c. Select the name and click OK.

   The owner appears on the Territory Team tab. You can add additional members to the team, and the owner himself can add members later.

4. From the territory Type list, select Prime.

5. From the Forecast Participation list, select Revenue and Nonrevenue. This setting enables the manager to adjust both the prime and overlay territory forecasts.

6. Click Save and Close.
Your new territory appears in the Territories table of your proposal.

7. Click the Coverages tab in the Details region at the bottom of the page.

Note: If the Coverages tab is blank, then your territory configuration is incomplete. Navigate to Scheduled Processes and check to see whether the Synchronize Stage Environment process completed successfully. See Enabling Territory Dimensions topic for more information.

8. In the Dimensional Coverage table, click Add.

The enabled dimensions appear. Every enabled dimension is represented by a column, and each column shows Any. For the Vision Corp. example, this entry means that sales accounts in any location and for any product are assigned to this territory. This is the setting you want for your top territory.

9. Click Done or continue adding subordinate territories.

Adding the Rest of the Hierarchy

Add the rest of the sales territory hierarchy from the top down as follows:

1. In Manage Territory Proposals page, select the name of your proposal. The territory proposal opens for editing.

2. Select the parent territory.

3. From the Actions menu, select Create and Update and Create Child. The application displays the Create Territory page and copies all of the existing coverage values.

4. Enter the territory name.

5. Enter the owner for the territory.

6. Select the territory type, either Prime or Overlay. For managers of salespeople with both prime and overlay territories, select Prime.

7. From the Forecast Participation list, select Revenue, Nonrevenue, or Revenue and Nonrevenue depending on the territory you are setting up. For managers of both prime and overlay territories, select Revenue and Nonrevenue so that the managers can adjust forecasts of all their subordinates.

8. Click Save and Close. You are returned to the Territory Proposal window. You are now ready to specify the coverage for the territory.

Defining the Territory Coverage

Perform the following steps to edit the territory coverage. When you create a child territory, it automatically inherits the coverage of its parent.

1. In Manage Territory Proposals page, select the name of your proposal. The proposal opens for viewing.

2. In the Territories table, select the territory you want to change.

3. Click the Coverages tab in the Details region of the page.

4. Click Edit (the pencil icon) in the Dimensional Coverage region of the tab. The Edit Coverage page appears.

5. For every dimension you want to change:

   a. Select the dimension from the Dimensions list.
   b. Add or remove dimension members from the Selected Dimension Members box.
For example, to specify the states in Vision Corp.’s West territory, you would move the following states to the Selected Dimension Members box:

- Alaska
- Arizona
- California
- Colorado
- Hawaii
- Idaho
- Montana
- Nevada
- New Mexico
- Oregon
- Utah
- Washington
- Wyoming

Tip: If the Product dimension does not show the correct list of products from the sales catalog, then navigate to the Scheduled Processes work area and run the Refresh Denormalized Product Catalog Table for BI process. The wrong products can show up in rare cases where you have changed the root of your sales catalog.

c. Click Save and Close.

You are returned to the Territory Proposal page. When you completed adding territories and specifying coverages, you are ready to activate your territory proposal.

Activating the Territory Proposal

When you have completed building your territory hierarchy, you can either click Activate while still editing the territory proposal, or use the following procedure to activate the territory proposal from the Manage Territory Proposals page.

To activate the territory proposal, do the following:

1. While signed in as a setup user, open the Manage Territory Proposals task from the implementation project or navigate to the Territories work area.
2. Click the Manage Territory Proposals link.

The Manage Territory Proposals page appears.

3. If the proposal you want to activate doesn’t appear in the Current Territory Proposals table, select All Proposals from the Proposals list.
4. Select the proposal and click Activate.

The application displays the proposal in the Completed Territory Proposals region. You can refresh the page to display the most recent status and navigate to the Territories page to view the territories after they are active.
Setting Assignment Options

Making Opportunity Assignment Automatic

By default, sales users must assign opportunities manually when they edit each opportunity. You can make the assignment of opportunities automatic by setting the system profile option Assignment Submission at Save Enabled.

To set the system profile option, do the following:

1. While signed in as a sales administrator or setup user, open the Manage Opportunity Profile Options task from the implementation project. You can also open the task from the Setup: Sales page, by clicking the Opportunity functional area and then clicking the Manage Opportunity Profile Options task name link.
2. In the Search region of the Manage Opportunity Profile Options page, enter Assignment Submission at Save Enabled in the Profile Display Name field.
3. In the MOO-OPTY_ENABLE_AUTO_ASSIGN: Profile Values region, select Yes from the Profile Value list.
4. Click Save and Close.

Running Assignment Processes

Running the Account Assignments Process

You must run the Request Account Assignments process to assign territories to accounts after you activate a territory proposal. You must also schedule this process to run regularly to ensure that all territories are assigned properly.

To run the process, do the following:

1. While signed in as a setup user, open the Request Account Assignments Process task in the implementation project.
2. If you are not using the implementation project, then do the following:
   a. Navigate to the Scheduled Processes work area.
   c. Enter Request Account in the Name field and press Return.
   d. Click OK. The Process Details page appears.
3. Make the entries described in the following table to assign all of the accounts:

<table>
<thead>
<tr>
<th>Field</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Object Code</td>
<td>Enter SalesAccount_ Work_Object.</td>
</tr>
<tr>
<td>Candidate Object Code</td>
<td>Enter SalesAccountTerritory_ Candidate_ Object.</td>
</tr>
</tbody>
</table>
### Assignment Mode

<table>
<thead>
<tr>
<th>Field</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment Mode</td>
<td>Select Territory from the list.</td>
</tr>
<tr>
<td>View Criteria Name</td>
<td>Enter AllSalesAccountsVC.</td>
</tr>
</tbody>
</table>

> **Note:** You can run the assignment process on a subset of records rather than on all records by entering different parameters in the View Criteria Name and View Criteria Bind Values fields. See the topic Scheduling Account Assignment: Explained in the Implementing Sales guide.

4. The first time you run the process click **Submit** to run it immediately.
5. You must also set up the process to run on a regular basis, perhaps once a day as follows:

   a. Click **Advanced**.
   b. Click the Schedule tab.
   c. Select the **Using a schedule** option.
The following figure shows a screen capture of the Process Details page with the Schedule tab and the Using a Schedule option selected. The frequency is set to Daily by default.

![Process Details](image)

d. Select the frequency and start date.
e. Enter an end date far in the future.
f. Click **Submit**.

6. Depending on your settings, your process runs immediately or at the intervals you specified. You can monitor its progress by searching for the process by name on the Overview page.

**Related Topics**
- Scheduling Account Assignment: Explained

**Running the Opportunity Assignment Process**

You must run the Revenue Territory Territory Based Assignment process to assign territories to opportunities after you activate a territory proposal. You must also set this process to run regularly to ensure that all territories are assigned properly.
Just how frequently and when to run this process depends on such factors as your opportunity volume and the sales cycle. To run the process, do the following:

1. While signed in as a setup user, open the Revenue Territory Territory Based Assignment task from the implementation project.
2. If you are not using the project, you can open the task as follows:
   a. While signed in as a setup user or sales administrator, select Scheduled Processes in the Tools group in the Navigator.
   c. In the Schedule New Process dialog, click Search: Name icon (down arrow) in the Name field and then select the Search link.
   d. In the Search and Select dialog, enter the process name Revenue Territory, and click Search. You can search by a partial name, but note that the search is case-sensitive.
   e. Select the process name in the results and click OK.
   f. Click OK again if required.

The Process Details window appears.

3. Enter the process parameters listed in the following table:
Field | Entry
--- | ---
View Criteria Name | Enter OpenOpportunitiesByCreationDate.

**View Criteria Bind Values**

You can have the option of assigning territories to those open opportunities created since a certain date or those created for a range of dates:

- For a specific date, enter `BindOptyCreationDateFrom=YYYY-MM-DD` where `YYYY-MM-DD` is the date you started implementing the application. For example, `BindOptyCreationDateFrom=2014-01-01` assigns all open opportunities created since January 1, 2014.
- To use a date range, enter `BindOptyCreationDateFrom=<date>, BindOptyCreationDateTo=<date>`. Note that the From and To values are separated by a comma.

**Note:** You can find more information about the process parameters in application help, by searching for the Revenue Territory Territory Based Assignment Process. Or, you can view article Opportunity Assignment Process Parameters (1507365.1) available on support.oracle.com.

4. To run this process periodically:
   a. Click **Advanced**.
   b. Select the Schedule tab.
   c. Select the **Using a schedule** option.
   d. Select the frequency and start date.

5. Click **Submit**.

6. Unless you specified a schedule, your process runs immediately. You can monitor its progress by searching for the process by name on the Overview page.
### Setting Up Leads

#### About Leads and Lead Types

In Oracle Sales Cloud, you use leads to capture interest in your product or service shown by a prospect or customer. Your business may get potential interest from multiple sources such as web visits, trade shows, marketing or sales campaigns, predictive analysis, purchased lists and so on. You want your field sales teams to focus on high potential interests. Your business can leverage leads functionality to qualify initial lead interest and convert leads to opportunities. A team of inside sales representatives or marketing and sales representatives can review generated leads to qualify and convert to opportunities.

#### Lead Types

In Oracle Sales Cloud, you can distinguish between net new leads, leads that require verification before creating new account and contact records in your application, from high-quality leads or leads for existing accounts and contacts. Net new leads keep the account and contact information in the lead as text until you are ready to convert them. Leads created for existing accounts and contacts, for example, by sales campaigns and product recommendations, are linked directly to those records.

The following table explains the key differences between the two types of leads.

<table>
<thead>
<tr>
<th>Lead Type</th>
<th>Display of Account and Contact Name</th>
<th>Account and Contact Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net new leads</td>
<td>Account and contact names are displayed as text.</td>
<td>New account and contact records are created only when a salesperson converts the lead to an opportunity.</td>
</tr>
<tr>
<td>Leads for existing accounts</td>
<td>Account and contact names display as links.</td>
<td>Accounts and contacts already exist in the application.</td>
</tr>
</tbody>
</table>
The following figure shows a partial screen capture of the Edit Lead page for a net new lead. Both the **Primary Contact** field (callout 1) and the **Account** field (callout 2) display as text.

**Edit Lead: Kroger: Summary**

- **Primary Contact**: Karan Gochal
- **Name**: Kroger
- **Job Title**: Vice President
- **Account**: General Corp.
- **Primary Product**: 
- **Contact Phone**: 1 ▼ 222 ▼ 6565
- **Contact E-Mail**: karan.gochal-demodata@oracle.com
- **Attachments**: None +
- **Description**: 

**Contact Address**

- **Country**: United States
- **Address Line 1**: 2 Manor St.
- **Address Line 2**: Canal Ave.

The following figure shows a partial screen capture of a lead for an existing account and contact. The entries in the **Primary Contact** field (callout 3) and **Account** field (callout 4) appear as links.
Entering and Editing Leads in the UI

As you start typing the lead account name or the primary contact name in the Create Lead page, the application suggests any matching accounts and contacts already in your database. If there is a match, then you make a selection from the list to link to the existing account or contact. If there is no match, the account or contact name is saved as text in the lead. No account and contact is created until you convert the lead into an opportunity.

If you have licensed Oracle Enterprise Data Quality and the Oracle Social Data and Insight Cloud service, then the salesperson can also use these services to check for duplicates and to enrich the account and contact records with additional information. The salesperson initiates the duplicate check by selecting the Check for Duplicates action.
Leads Use Case Covered in This Chapter

This chapter covers the setup for a common use case for qualifying leads you gathered from multiple sources such as web visits, trade shows, marketing or sales campaigns, predictive analysis, purchased lists and so on. Because the majority of these leads are for prospects, you import them as net new leads so you can qualify and convert them to opportunities. This use case follows the common practice of using inside sales to do the initial lead qualification, but there is nothing stopping you from modifying the use case to suit your needs.

This topic provides a brief overview of the use case and then discusses some key details of how the organization processes leads.

Use Case Overview

Vision Corp. uses a team of inside sales representatives to perform the initial lead qualification. Qualified leads are then assigned to field sales representatives for further assessment and then they convert the leads into opportunities to pursue.

Here is an overview of how Vision Corp. processes leads:

1. A sales administrator imports the leads using the import macro you download from My Oracle Support.
2. Using an assignment rule you create, the application automatically assigns imported leads to inside sales representatives.
3. Inside sales representatives review the list of leads and select the leads they want to work on.
4. The inside sales representatives verify the information in each lead, check for potential duplicates, and answer a standard list of questions in a qualification template.
5. When leads meet the qualification criteria, then the inside sales representatives set the leads to the qualified status.
6. If the leads do not meet the criteria, then the inside sales representatives can retire them instead.
7. A qualified lead is automatically assigned by the application to sales territories of the field sales organization.
8. A field sales representative reviews the assigned leads and converts them to opportunities if it is fully qualified. Different sales teams may have different criteria to convert or retire a lead. The conversion process makes the representative doing the conversion the owner of the new opportunity and creates any new account and contact records. The lead is automatically set to a converted status and remains linked to the account and opportunity records.
The following diagram illustrates the Vision Corp. processes:

How Inside Sales Accesses and Works Leads

Who can view a lead is restricted to:

- The person who imports the leads
- The members of the lead sales team
- The lead owner
- The managers of these people

The assignment rule you create as part of this use case assigns all inside sales representative to the sales teams of the imported leads. This assignment ensures that the inside sales representatives have continued access to the leads, but it does not assign them ownership of the leads. Salespeople become owners of a lead only when they accept a lead.

The figures and steps that follow describe sales representative activities in the Leads work area, aligning with the Vision Corp. use case.

Sales representatives work on leads in the Leads work area, as shown in the following figure. Callouts highlight key features of the page as described in the following table.
To find the imported leads they can work on, the inside sales representatives select the **Unaccepted Leads** list. You must create this list of imported leads during your setup.

Representatives accept ownership of the leads they want to work on, either by:

- Selecting the **Accept** from the **Actions** list.
- Or by drilling down on the lead name and clicking the **Accept** button in the Edit Lead page.

By accepting the lead, a representative becomes the lead owner and can now see the lead listed in the **My Open Leads** list.

Inside sales representatives check if the account and contact information in the lead duplicates information that’s already in Oracle Sales Cloud. In our use case, the representatives check for duplicates manually in the leads UI by selecting the **Check for Duplicates** action.

The representatives qualify the leads, guided by the questions you set up as part of a qualification template. Using the qualification template, while not mandatory, ensures everyone follows the same procedure for qualifying leads.

The following figure shows a screen capture of a sample qualification template, which is displayed in the Qualification tab (callout 1) on the Edit Lead page. Sales representatives answer the questions you provide (callout 2). These questions are organized in question groups, which serve as headings on the page. As they answer the questions,
users get visual feedback on the quality of the lead, using the ratings and color schemes you select during qualification template setup (callout 3).

5. When inside sales representatives set the lead status to Qualified, an assignment process assigns the lead to the appropriate sales territory. The process also adds the appropriate field sales representatives to the sales team.

6. The field sales representatives convert the lead to an opportunity by selecting the **Convert** from the **Actions** menu after viewing the lead.

7. Field sales representatives have a chance to rename the opportunity in the Convert window and change opportunity ownership, if required.
The following figure shows a screen capture of the Convert window.

![Convert Window](image)

Importing Leads

You can import leads either as net new leads, as leads linked to existing accounts and contacts, or you can create the new prospect accounts and contacts from your import.

Here are the main differences:

- **Net new leads**

  You import the account and contact as part of the lead object. You can use the Excel macro provided by Oracle to import these types of leads. Account and contact records are created when the sales representatives convert the leads to opportunities. The sales representatives qualifying the leads must manually check for any duplicate account and contact records.

- **Leads linked to existing accounts and contacts**

  You must use IDs to reference the existing accounts and contact record in your import file. You can use the IDs you generated in your account and contact import files or you can export IDs from your application. You cannot use the leads import Excel macro for this type of import.

This guide discusses only the import of net new leads. You must refer to the Understanding File-Based Data Import and Export guide to understand how to import the other types of leads.

Leads Setup Overview

The following table outlines the setup steps required to set up the Vision Corp. leads use case covered in this chapter.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create the assignment rule to assign the leads to the inside sales representatives who will qualify them.</td>
<td>Manage Sales Lead Assignment Rules</td>
<td>See the Setting Up the Assignment Rule for Assigning Leads topic in this chapter.</td>
</tr>
<tr>
<td>Step</td>
<td>Description</td>
<td>Task Name</td>
<td>Where to Get More Details</td>
</tr>
<tr>
<td>------</td>
<td>-------------</td>
<td>-----------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>2</td>
<td>Set two system profile options to enable lead assignment. Setting Lead Assignment Mode to Both turns on both rule-based and territory-based assignment. Setting the Assignment Rule for Rule Based Lead Assignment profile option tells the application which rule category to use.</td>
<td>Manage Sales Lead Profile Options</td>
<td>See the Enabling Lead Assignment topic in this chapter.</td>
</tr>
<tr>
<td>3</td>
<td>Before importing your leads, you can optionally change the values provided by Oracle for lead rank and the lead source channel. Salespeople can use lead rank, for example, hot or cold, to prioritize leads to work on next. The lead source channel indicates if the lead came from the web, an e-mail and so on.</td>
<td>Manage Set Enabled Lookups</td>
<td>See the Changing the Lead Rank and Lead Channel topic in this chapter.</td>
</tr>
<tr>
<td>4</td>
<td>Download the Excel macro and import mapping for leads from support.oracle.com upload the mapping to your application using the Manage File Import Mappings task, and import. You can import up to 1000 leads at a time by clicking a button in the macro.</td>
<td>Manage File Import Mappings</td>
<td>See the Importing Leads topic in this chapter.</td>
</tr>
<tr>
<td>5</td>
<td>Run the lead assignment process twice: the first time to assign the imported leads to inside sales and the second time to assign qualified leads to field sales. You can also schedule assignment process to run at regular intervals.</td>
<td>Manage Lead Processing Activities</td>
<td>See the Running the Lead Assignment Process topic in this chapter.</td>
</tr>
<tr>
<td>6</td>
<td>Create a list that inside sales representatives use to view the imported leads that are available for them to work on.</td>
<td>Manage Sales Lead Qualification Templates</td>
<td>See the Creating a List of Unaccepted Leads topic in this chapter.</td>
</tr>
<tr>
<td>7</td>
<td>Create a lead qualification template. The template includes questionnaire you want inside sales to use as a guideline for qualifying the lead.</td>
<td>Manage Sales Lead Qualification Templates</td>
<td>See the Creating a Lead Qualification Template topic in this chapter.</td>
</tr>
<tr>
<td>8</td>
<td>Specify the qualification template you created as the template you want to appear in the lead by default. This is accomplished by setting the system profile option</td>
<td>Manage Sales Lead Administrator Profile Values</td>
<td>See the Selecting the Default Lead Qualification Template topic in this chapter.</td>
</tr>
</tbody>
</table>
Setting Up the Assignment Rule for Assigning Leads

You can use assignment rules to automatically assign your leads to sales resources or to sales territories. In this procedure, you set up a rule that assigns imported leads to sales resources, the inside sales representatives.

Creating the assignment rule involves the following three major steps:

1. Create a rule set.
2. Create the rule.
3. Publish the rule set.

Creating the Rule Set

You must create a rule set before you create your rule. The rule set makes it possible for you to have more than one rule for your lead assignment, if required. Create the rule set as follows:

1. Open the Manage Sales Lead Assignment Rules task from the implementation project, or by searching for the task by name in the Setup and Maintenance work area.
2. Select the Sales Lead Resource Rule Category from the Category list. You are assigning resources to the leads.
3. Create a rule set:
   a. Click Add Row (plus sign icon) in the Rule Sets region toolbar.
   b. Enter a rule set name in the Name field and an optional description.
   c. Make sure that All is selected as the Filter.

   The All setting ensures that all the inside sales representatives are assigned to all of the lead sales teams so each sales representative can work any of the leads you import.

   If you selected Random as your filter value, then the inside sales representatives are assigned to the lead teams at random. Each representative would be assigned approximately to the same number of leads, but the representatives could not view and work on the leads assigned to the others.

   d. Save.

Creating the Rule

Now create the rule to assign the inside sales representatives to all imported leads that are unqualified. Use the following steps:

1. With the rule set you just created selected, click Create (the plus sign icon) in the Rules region.

   The Create Rule page appears.
2. Enter a rule name and an optional description.
3. In the Conditions region, make sure the **All conditions met** operator is selected for the **Rule Applies If** field.
4. Click **Add Row** (the plus sign icon).
5. Now enter the first of the two conditions. This first condition ensures that the rule only assigns imported leads.

The following table lists the fields and entries to enter the condition.

<table>
<thead>
<tr>
<th>Field</th>
<th>Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object</td>
<td>Sales Lead</td>
</tr>
<tr>
<td>Attribute</td>
<td>Import Activity Identifier</td>
</tr>
<tr>
<td>Operator</td>
<td>Is not blank</td>
</tr>
</tbody>
</table>

6. Click **Add Row** again and enter the second condition as described in the following table. This condition assures that the rule assigns only unqualified leads.

<table>
<thead>
<tr>
<th>Field</th>
<th>Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object</td>
<td>Sales Lead</td>
</tr>
<tr>
<td>Attribute</td>
<td>Status</td>
</tr>
<tr>
<td>Operator</td>
<td>Equals</td>
</tr>
<tr>
<td>Value</td>
<td>Unqualified</td>
</tr>
</tbody>
</table>

7. In the Action region, enter the names of the inside sales representatives who work the imported leads. To add each sales representative, do the following:
   
   a. Click **Select and Add** (plus sign icon).

   The Select and Add window appears.
   
   b. Search by name.
   
   c. Select the name.
   
   d. Click **OK**.

   Clicking **Apply** instead keeps the window open so you can add additional resources.

8. Click **Save and Close**.

You are returned to the Manage Sales Lead Assignment Rules page.

---

**Publishing the Rule Set**

For the rule to become active, you must publish the rule set after each change by clicking the **Save and Publish** button on the Manage Sales Lead Assignment Rules page. The application lists the day and time when the rule was last published.

The following table describes the UI fields and buttons highlighted in the subsequent figure.
### Setting Up Leads

#### Callout | Name in UI | Description
---|---|---
1 | Name | Name of the rule set.
2 | Rule Set Filter | The filter permits you to either assign all the resources in your rule to each lead sales team or to distribute the leads randomly among the resources.
3 | Rules | Region from where you create the rules for the rule set.
4 | Save and Publish | You must save and publish for your rules to become active.

The following figure shows a screen capture of the Manage Sales Lead Assignment Rules page highlighting key entries described in the table.

---

### Enabling Lead Assignment

Use this procedure to enable both rule assignment and sales territory assignment by setting the two system profiles options described in the following table.

#### System Profile Option Display Name | Value | Description
---|---|---
Lead Assignment Mode | Both | Specifies if you are using rules, sales territories, or both for assigning leads. Vision Corp. is using both.
Assignment Rule for Rule-Based Lead Assignment | Sales Lead Resource Rule Category | Specifies the rule category for the rule used for lead assignment.
To set these profile options, do the following:

1. Sign in as a setup user and open the Manage Sales Lead Profile Options task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.

   The Manage Administrator Profile Values page appears.

2. Enter the profile option name in the Profile Display Name field.

3. Click Search.

   The application displays the profile option information.

4. For the Assignment Rule for Rule-Based Lead Assignment profile, click Add (the plus sign icon) in the Profile Values region and select Site as the Profile Level. For the Lead Assignment Mode system profile option, this selection is already made for you.

5. In the Profile Values region, select the value from the Profile Value list.

6. Click Save and Close.

### Changing the Values for Lead Rank and Lead Channel

Optionally, you can change the values you use for lead rank and lead channel by editing their lookup values. Lead rank can be used by salespeople to prioritize leads to work on. The lead channel records the source of the lead. After you complete your edits, you must copy the edited values to the lead import macro.

Oracle includes the following predefined lead ranks in the lookup type Lead Rank (MKL_LEAD_RANK_SETID):

- Cold
- Hot
- Warm

Oracle includes the following predefined values for lead channel in lookup type Lead Channel (MKL_LEAD_CHANNEL_SETID):

- Direct Mail
- E-Mail
- Fax
- Marketing Cloud
- Phone
- Sales campaign
- Sales visit
- Social
- Company web site
- Wireless Message
- Model-based prediction
- Rules-based prediction
Use this procedure to change the existing values and to add new ones:

1. While signed in as a setup user, open the Manage Set Enabled Lookups task from the implementation project, or after searching for the task by name in the Setup and Maintenance work area.

   The Manage Set Enabled Lookups page appears.

2. In the Search region, enter either of the lookup type names Lead Channel or Lead Rank in the Meaning field and click Search.

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

3. You can change the lookup codes as follows:
   - For the existing values, you can change the wording displayed to the user by modifying the meaning or you can end date values you do not need.
   - You can add new values, by clicking New (the plus sign icon).

4. Click Save and Close when you are done.

5. If you made changes, then you must remember to enter the changes on the Lead Channel and Lead Rank worksheets in the lead import macro.

### Importing Leads

#### Overview

You can import leads using the lead import macro, the file import feature, or web services depending on the type of lead and your business needs. Use the macro import covered in this section for importing up to 1000 net new leads at a time. Net new leads are leads your organization must verify before you want to enter them as records in your application. Importing net new leads does not automatically create account and contact records. Accounts and contacts are created only when salespeople convert them into opportunities.

Importing leads using the macro provided by Oracle involves the following three steps. The first two are required to get you ready.

1. You download two files from My Oracle Support: the macro and the mapping used by the macro for the import.
2. You upload the mapping to your Oracle Sales Cloud application.
3. You enter the lead data into the macro and import.

> **Note:** You can modify the macro to import additional fields, including any fields you created. If you modify the macro, then you must create a new mapping to use in your import. The steps for modifying macros are not covered in this guide.

#### Getting Ready to Use the Lead Import Macro

> **Watch:** In this tutorial, you learn how to download the Excel macro provided by Oracle for importing leads into Oracle Sales Cloud and how to set up your application so you can use it. The content of this video is also covered in text topics.
Downloading the Mapping and Macro for Importing Leads

To import leads, you must download two files:

<table>
<thead>
<tr>
<th>File Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>R12_Lead_Quick_Import_Macro.xlsx</td>
<td>An Excel macro which you populate with the lead data you want to import</td>
</tr>
<tr>
<td>R12_Lead_Import_Macro_Mapping.csv</td>
<td>The mapping the application uses for the import</td>
</tr>
</tbody>
</table>

The files are available on My Oracle Support, in article Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1).

Follow these steps to download the files:

1. Sign in to support.oracle.com.
2. Search for 2229503.1.
3. Scroll down in the article to the Details region and click on the links in the Excel Macro Files and Mapping Files columns to download the two files from the table.
4. Save the files to a folder on your computer.
   The application saves import logs to this folder.

Uploading the Mapping for Lead Import

You must upload into the application the mapping file you downloaded earlier. You also must record the mapping ID. Use the following procedure:

1. While signed in as a setup user, navigate to the Setup and Maintenance work area. Open the Manage File Import Mappings task from the implementation project or after searching for the task by name.
   The Manage File Import Mapping page appears.
2. Click Import Mapping at the top of the page.
3. Click Choose File. Select the R12 Lead Import Macro Mapping file and click OK.
   The mapping is now listed at the bottom of the page.
4. You must enter the mapping number into the import macro. You can either record the number on the Manage File Import Mapping page by hand, or you can drill down on the mapping name and copy the number to your clipboard from the Edit Import Mapping page.
   The following figure shows a detail of the Manage File Import Mapping page with the mapping number highlighted.

Entering Lead Data into the Macro and Importing
Watch: In this tutorial, you learn how to enter your leads data into the Excel macro provided by Oracle for importing leads. The content of this video is also covered in text topics.

Watch: In this tutorial, you learn how to import the leads you entered in the Excel macro provided by Oracle. The content of this video is also covered in text topics.

**Entering Lead Data into the Import Macro and Importing**

Follow these steps to populate the R12_Lead_Quick_Import_Macro.xlsm lead import macro with your data and perform the import.

1. Open the R12_Lead_Quick_Import_Macro.xlsm file you downloaded earlier.
   - If you have not enabled macros, Microsoft Excel warns you that macros have been disabled. In this case:
     a. Click Options.
        - The Microsoft Office Security Options window appears.
     b. Select the Enable this content option and click OK.
2. In the Mapping field, enter the mapping number you obtained earlier.
3. If you customized lead rank or the lead channel lookup types, then enter the new values in the Lead Rank and the Lead Channel worksheets.
4. In the Template worksheet, enter your lead data. You can import up to 1,000 records at a time. The following table describes the columns. Note that most of the information is optional. The import requires just four pieces of information for each lead and you must enter just three:
   - Lead name
   - Account name
   - Contact full name

The macro automatically generates the required lead number after you click Create Import Activity. However, your use case may require additional information. For example, you must have some contact information for your inside sales representatives to qualify the lead.

If you are assigning leads using geographical sales territories based on the state where the business is located, as in our use case, then you must either import the state for each lead or have the inside sales representatives supply that information during the qualification process.

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Number</td>
<td>Leave this required column blank. The macro generates the lead number automatically using the date and time. The application uses the lead number to identify the lead record for updates.</td>
</tr>
<tr>
<td>Lead Name</td>
<td>The lead name identifies the lead in the lists sales representatives see in the Leads work area. In the UI, the application automatically enters a lead name as a combination of the contact name and the date and time. You may want to follow the same practice in your import. Entry in this field is required.</td>
</tr>
<tr>
<td>Account Name</td>
<td>Organization name. Entry is required.</td>
</tr>
<tr>
<td>Contact Full Name</td>
<td>You must enter the contact’s first and last names separated by a space.</td>
</tr>
<tr>
<td>Column</td>
<td>What to Enter</td>
</tr>
<tr>
<td>---------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Job Title</td>
<td>Job title.</td>
</tr>
<tr>
<td>E-mail</td>
<td>Contact e-mail address.</td>
</tr>
<tr>
<td>Phone Country Code</td>
<td>Contact phone country code.</td>
</tr>
<tr>
<td>Phone Area Code</td>
<td>Contact phone area code.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Contact phone number with no spaces or delimiters.</td>
</tr>
<tr>
<td>Address 1</td>
<td>Contact address line 1. If you convert the lead to an opportunity, then the application uses the</td>
</tr>
<tr>
<td></td>
<td>address entered in the contact address fields both as the contact address and the account address.</td>
</tr>
<tr>
<td>Address 2</td>
<td>Contact address line 2.</td>
</tr>
<tr>
<td>Address 3</td>
<td>Contact address line 3. This column (L) is hidden in the macro by default.</td>
</tr>
<tr>
<td>City</td>
<td>Contact address city.</td>
</tr>
<tr>
<td>State</td>
<td>Vision Corp. has set up geographical sales territories for the US, so you must enter the state for</td>
</tr>
<tr>
<td></td>
<td>leads to be assigned. You must spell out the names of states to match the geography reference data.</td>
</tr>
<tr>
<td>Province</td>
<td>This column (O) is hidden in the macro.</td>
</tr>
<tr>
<td>Zip Code</td>
<td>Postal code.</td>
</tr>
<tr>
<td>Country</td>
<td>The ISO two-letter code for the country.</td>
</tr>
<tr>
<td>Product Group</td>
<td>Enter the Product Group Reference Number. You can copy this number from the macro you used to</td>
</tr>
<tr>
<td></td>
<td>import product groups.</td>
</tr>
<tr>
<td>Product</td>
<td>Product name you imported earlier. This column (S) is hidden in the macro by default. If you are</td>
</tr>
<tr>
<td></td>
<td>importing a product interest for a lead, you cannot import a product group at the same time.</td>
</tr>
<tr>
<td>Lead Rank</td>
<td>You must use one of the standard values provided by Oracle in the macro, unless you customized</td>
</tr>
<tr>
<td></td>
<td>them. The standard values are:</td>
</tr>
<tr>
<td></td>
<td>○ Cold</td>
</tr>
<tr>
<td></td>
<td>○ Hot</td>
</tr>
<tr>
<td></td>
<td>○ Warm</td>
</tr>
<tr>
<td>Column</td>
<td>What to Enter</td>
</tr>
<tr>
<td>-------------------</td>
<td>-------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Lead Channel</td>
<td>You must use one of the standard values provided by Oracle in the macro, unless you customized them. The standard values are:</td>
</tr>
<tr>
<td></td>
<td>◦ Direct Mail</td>
</tr>
<tr>
<td></td>
<td>◦ E-Mail</td>
</tr>
<tr>
<td></td>
<td>◦ Fax</td>
</tr>
<tr>
<td></td>
<td>◦ Marketing Cloud</td>
</tr>
<tr>
<td></td>
<td>◦ Phone</td>
</tr>
<tr>
<td></td>
<td>◦ Sales campaign</td>
</tr>
<tr>
<td></td>
<td>◦ Sales visit</td>
</tr>
<tr>
<td></td>
<td>◦ Social</td>
</tr>
<tr>
<td></td>
<td>◦ Company web site</td>
</tr>
<tr>
<td></td>
<td>◦ Wireless Message</td>
</tr>
<tr>
<td></td>
<td>◦ Model-based prediction</td>
</tr>
<tr>
<td></td>
<td>◦ Rules-based prediction</td>
</tr>
</tbody>
</table>

5. When you are done with your entries, click **Create Import Activity**.

6. If the **You must correct errors in your entries** message appears, then:
   
   a. Click **OK**
      
      The Error worksheet displays your errors.
   
   b. Click each error link in column D and make the correction on the Template worksheet.
      
      ✍ **Note:** After you correct an error, you must click outside the field for the correction to be recognized.
   
   c. Click **Create Import Activity** again.

7. On the Login page, enter the following:
   
   o Host information for your environment. The host name is the portion of the URL between the `https://` and `/sales`. You must be signed in and navigate to one of the sales work areas to ensure the host name is correct. The name on the sign-in page and on setup pages is different.
   
   o Your user name
   
   o Your password

8. Click **Submit**.

   The application displays one of the messages listed in the following table:

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted successfully.</td>
<td>Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>Message</td>
<td>Meaning</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>----------------------------------------------------------</td>
</tr>
<tr>
<td>Unable to connect to the server at this time.</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>Unable to submit the file import activity. Check log for details.</td>
<td>You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors work sheet to view the error details.</td>
</tr>
</tbody>
</table>

9. If your import activity was submitted successfully, then click **Activity Details**.

The Activity Details window appears, listing the import activity name, its ID and its status.

- If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
- If your import completed successfully, then the status listed is **Completed**.

10. Optionally, click **Generate Log** to save a file listing the leads that were imported.

### Running the Lead Assignment Process

In support of the Vision Corp. use case, you must run the assignment process twice. You run the process the first time to assign the imported leads to the inside sales representatives for lead qualification. Run the assignment process a second time to assign the qualified leads to field sales for conversion to opportunities. You run the process by creating a lead processing activity as follows:

1. Open the task **Manage Lead Processing Activities** from the implementation project or after searching for the task by name in the Setup and Maintenance work area.

   The Lead Processing Activities page appears. This page lists all of your processing activities.

2. Click **Create Lead Processing Activity**.

   The Create Lead Processing Activity window appears.

3. To assign the leads you imported to inside sales for qualification, enter the parameters listed in the following table.

<table>
<thead>
<tr>
<th>UI Region</th>
<th>Field</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Details</td>
<td>Process Type</td>
<td>Assignment</td>
</tr>
<tr>
<td>Lead Selection</td>
<td>Status</td>
<td>Unqualified</td>
</tr>
<tr>
<td>Lead Selection</td>
<td>Assignment Status</td>
<td>Unassigned</td>
</tr>
<tr>
<td>Schedule</td>
<td>Schedule Mode</td>
<td>Immediate</td>
</tr>
</tbody>
</table>

4. Click **Submit**.

5. Now create and submit a second activity to assign the leads to field sales after the leads are qualified. Enter the parameters listed in the following table.
Creating a List of Unaccepted Leads

Use these steps to create a list to display the leads you imported in the Leads work area. Inside sales representatives use the list to review incoming leads and accept the leads they want to work on. After sales representatives accept a lead, it displays among the leads they own and no longer appears on the list.

Sales administrators and setup users can create lists for the whole organization or lists targeted to specific job roles. To create the lists, you must:

1. Get ready to create lists by creating and activating a sandbox and opening the Page Composer tool.
2. Create your list.
3. Publish the sandbox to make the list available for use.

Getting Ready to Create Lists

Follow these steps to create and activate a sandbox and get ready to start creating a list:

1. While signed in as a setup user, click your user name at the top right corner of the page, select Manage Sandboxes, and create and activate a sandbox:
   a. In the Manage Sandboxes window, click New (the plus icon).
   b. Enter a sandbox name in the Create Sandbox window and click Save and Close.
   c. Select the sandbox you just created and click Set as Active.

The application displays a bar across the top of the window indicating the sandbox is active.

2. Navigate to the Leads work area.
3. Click your user name again and select Customize Pages.

The Customize Pages window appears.

4. Select Site.
All users will see the list among the available lists in the work area. However, only the inside sales representatives who are assigned to the imported leads and their managers can view the leads in the list.

You can, instead, target the list to a specific job role by selecting **Job Role** and entering the job role. However, targeting the list specifically to inside sales representatives would require additional setup:

- You must also be assigned the job role so you can test the list. See the section on enabling testing in the Extending Sales guide for more details.
- Both inside sales and field sales representatives are assigned the same Sales Representative job role. If you wanted to target the list specifically to inside sales, then you would have to create your own job role as described in the Securing Sales guide.

5. Click **OK**.

The Editing: User Interface bar appears at the top of the page indicating that you are in Page Composer.

The following figure shows a screen capture of the Sandbox bar (identified by callout 1) and the Editing: User Interface bar (callout 2). The sandbox bar lists the name of the sandbox.

5. Click **OK**.

The Editing: User Interface bar appears at the top of the page indicating that you are in Page Composer.

The following figure shows a screen capture of the Sandbox bar (identified by callout 1) and the Editing: User Interface bar (callout 2). The sandbox bar lists the name of the sandbox.

You are now ready to create the list. After you create and test the list, you must publish the sandbox to make your list available to your users.

**Creating the List**

With both the sandbox and the Editing: User Interface Page Composer toolbar displayed on the top of the page, follow these steps to create the list. You create the list by editing an existing list and saving it under a new name.

1. In the Leads work area, click **Show Advanced Search** (the filter icon) to the right of the **List** field.

The Advanced Search pane appears.

2. From the **Saved Search** list, select the **My Open Leads** list to use as the starting point for creating a new one.

3. Add the **Accepted** field to your search criteria, by using the **Add** button at the bottom of the pane, then enter the search criteria listed in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Operator</th>
<th>Entry</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Set</td>
<td>Equals</td>
<td>Records where I am on the team</td>
<td>The assignment rule you created assigns all the inside sales representatives to the lead sales team. The default</td>
</tr>
</tbody>
</table>
### Field | Operator | Entry | Explanation
--- | --- | --- | ---
Name | Starts with | Leave blank. | Leave this field blank.
Status | Equals | Unqualified | Imported leads are unqualified by default.
Creation Date | After | Enter a date and time prior to the import. | Restricts search to improve performance. For example, you may restrict search to leads created in last 60 days depending on your typical lead life-cycle.
Accepted | Equals | No | When they accept leads, inside sales representatives become lead owners and the lead drops off the list.

4. You can test your search by clicking **Search**.
5. When you are satisfied with the results, click **Save**.

The Create Saved Search window appears.

6. Enter a new name for the saved search. For example: **Unassigned Leads**.

You cannot reuse the names of the saved searches provided by Oracle with the application.

7. Make sure the **Run Automatically** option remains selected. Selecting this option runs the query each time a sales representative selects the list in the UI.

8. Make sure the **Set as Default** option is not selected. You do not want all sales representatives to see this list whenever they navigate to the leads work area.

9. Click **OK** to return to the Saved Searches window.

### Publishing the Sandbox

To publish the sandbox, do the following:

1. Click the sandbox name.
2. Click **Exit Sandbox**.

The Exist Sandbox window appears.

3. Click **Yes**.
4. Click your user name at the top right corner of the page and select **Manage Sandboxes**.
5. Click **Publish**.
Creating a Lead Qualification Template

You can use the Lead Qualification template to set up questionnaires to guide your sales representative as they qualify leads. You can set up multiple qualification templates for different products, as needed.

To create the template, do the following:

1. Open the Manage Sales Lead Qualification Template task from the implementation project, or after searching for the task by name in the Setup and Maintenance Work area.

   The Manage Sales Lead Qualification Template page appears listing the predefined template provided by Oracle. You can use this template as a model for your setup.

2. Click Create (the plus sign icon).

   The Manage Assessment Template page appears.

Entering Basic Template Details

Enter the following in the Enter Details page:

1. Enter a template name. For example: Imported Web Leads.
2. Select Lead as the Template Type.
3. For the Template Set, select Common Set.

   Sets make it possible for you to target different qualification templates for different business units, but the application covered in this guide uses only one business unit. For an explanation of how you can tailor Oracle Sales Cloud for multiple business units, see the Implementing Sales guide.

4. Click Next.

Configuring Ratings

Ratings group question responses in a template into different categories. There are three predefined ratings: Poor, Average, and Excellent. You can add your own ratings or modify the predefined ratings. When you are done, click Next.

Creating the Question Groups, Questions and Responses

Use the following steps to create the question groups, which serve as headings in the template, and the questions within each group:

1. Click Create (the plus icon) and select Create Question Group.
2. Enter a name, which appears as the heading for this group of questions, and click Save and Close.
3. Now create your questions for this group. For each question:
   a. Click Create (the plus icon) and select Create Question.
      The Create Question window appears.
   b. Enter the question text.
   c. Enter a weight indicating how important this question is in the qualification process. You have a chance to revisit and adjust the weights to all the questions at a later stage.
   d. Click Save and Close.
4. Enter the possible responses for each question:

   a. Enter the response, score and rating.

   The following table lists the response entries for a yes or no question, for example: did you reach the contact by phone?

<table>
<thead>
<tr>
<th>Response</th>
<th>Score</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>100</td>
<td>Excellent</td>
</tr>
<tr>
<td>No</td>
<td>0</td>
<td>Poor</td>
</tr>
</tbody>
</table>

   b. When you complete entering your questions, you can reorder the questions by clicking Move (the double right arrow).

5. Click Next.

   The Edit Question Weights page appears.

**Editing Question Weights, Configuring Score Ranges, and Associating Task Templates**

Use the following steps to edit the question weights, configure score ranges, and associate task templates:

1. On the Edit Question Weights page, the weights in the Weights column for each question until the total equals 100.

2. Click Save and then Next.

   The Configure Score Range Attributes page appears.

3. The application derives the score range for ratings using the scoring to response mapping in the questions and responses that you entered earlier. You can select the Override Score Ranges option to edit the automatically derived score ranges and set different start and end scores for the ratings. You can also use the Graph Color list to change the colors shown in the various score ranges.

   The following figure shows the Configure Score Range Attributes page.

4. Click Next.

   The Associate Task Templates page appears where you can add any task templates you have created.

**Deploying the Qualification Template**

When you are ready to deploy the qualification template, do the following:

1. Click Save.

2. Click Deploy.

3. Click OK to close the confirmation window.

   The application displays any errors in setup. For example, if you did not enter question weights which total 100.

   **Note:** You cannot edit many aspects of the template after you deploy it. You may have to copy the deployed template and edit the copy.
Selecting the Default Lead Qualification Template

To turn on lead qualification, you must specify which lead qualification template you want to use as the default by setting the system profile Advanced Lead Qualification Enabled. You can select a single template for use for the whole sales organization, display a different template depending on the product group in the lead, and you can assign specific templates to different users. The settings are not mutually exclusive. You can provide a template for the whole organization, but target different template to individual users or product groups.

To set the system profile do the following:

1. Sign in as a setup user and open the Manage Sales Lead Administrator Profile Values task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area. The Manage Administrator Profile Values page appears.
2. Enter Advanced Lead Qualification Enabled in the Profile Display Name field.
3. Click Search. The application displays the profile option information.
4. In the Profile Values section, click New.
5. If you are using only one template, then select Site from the Profile Level list. The options are:
   - Site
     The same template is used for the entire organization unless you specify additional templates for product and user.
   - Product
     The template is used for a product group. All other product groups are assigned the template you specify at the site level.
   - User
     The template is used for the user you enter. All other users are assigned templates for the product or the site.
   Select the name of the template from the Profile Value list.
6. Repeat the previous steps for additional products and users.
7. Click Save and Close.

Testing Your Leads Setup

Test your leads setup by impersonating the inside sales representative to accept and qualify the lead and then impersonating the field sales representative to convert the lead to an opportunity.

Impersonating the Inside Sales Representative

1. Sign in as one of the inside sales representatives and navigate to the Leads work area.
2. Select the list of unaccepted leads you created. The list should contain all your imported leads.
3. Open one of the leads and click **Accept**.
   You should now be listed as the lead owner.
4. Click the **Sales Team** tab to make sure all the appropriate sales representatives are listed.
5. Click the **Qualification** tab.
   The tab displays the qualification template you created.
6. Answer the questions.
7. Make sure that the information in the lead you are qualifying is sufficient to assign the lead to the field service representative you are using for testing.
   In our use case, qualified leads are assigned to sales territories by state. Make sure that the contact address in the lead includes one of the states in the US that belong to the territory of the field sales representative you are using for testing. The name of the state must be spelled out for the lead to be assigned correctly to a sales territory.
8. Click **Qualify** to indicate the lead is qualified.

### Impersonating a Field Sales Representative

1. You must wait for the assignment process you scheduled during setup to assign the lead or you must run the process again, this time, immediately.
2. Sign in as the field sales representative who owns the territory the qualified lead is assigned to.
3. Navigate to the Leads work area.
4. Select the **Open leads where I am on the team** list.
5. Edit the lead.
6. From the **Actions** menu, select **Convert**.
   The Convert window appears.
7. Optionally, change the opportunity name to something more meaningful.
8. Click **Submit**.
9. Navigate to the Opportunity work area. The new opportunity should be listed in the My Open Opportunities list.
10. You can open the opportunity and view the created account and contact from there.
# Setting Up Competitors

## About Setting Up Competitors

The sales organization can track and analyze the impact competitors are having on sales by recording the competitors in each opportunity. By default, Oracle Sales Cloud requires salespeople to enter the primary competitor whenever they close an opportunity. Unless you changed that default, you must create the list of competitors to enable opportunity closing.

To create the list of competitors, you are only required to enter competitor names. However, you can track other information about competitors in the Competitors work area. The following table lists the information you can enter in the different tabs.

<table>
<thead>
<tr>
<th>Information You Can Enter</th>
<th>Competitor Work Area Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information about the strengths, weaknesses, opportunities, and threat level (SWOT)</td>
<td>SWOT</td>
</tr>
<tr>
<td>The product groups in the sales catalog the competitor is competing against.</td>
<td>Product Groups</td>
</tr>
<tr>
<td>Related documents</td>
<td>Attachments</td>
</tr>
<tr>
<td>Names of internal contacts who know the competitor.</td>
<td>Internal Experts</td>
</tr>
<tr>
<td>Geographical regions where the competitor is active based on the geography reference information you imported.</td>
<td>Geographies</td>
</tr>
<tr>
<td>Industries where the competitor is active based on the industry classification you are using.</td>
<td>Industries</td>
</tr>
</tbody>
</table>

The Opportunities tab automatically displays all of the opportunities where that competitor has been selected as the primary competitor.

Access to the Competitors work area is restricted to users with the Sales Administrator job role. However, sales managers and others in the sales organization can access preconfigured reports to view the effects of the competitors entered in opportunities.

**Related Topics**

- [Sales Competitors: Overview](#)
- [Managing Sales Competitors: Procedures](#)
Creating the List of Competitors

Use this procedure to create the list of competitors for selection in the Edit Opportunity page.

1. While signed in as a setup user, open the task Create Competitors in the implementation project. Alternatively, sales administrators and setup users can click the Competitors link available under the Sales heading in the Navigator.

The Review Competitors page appears.

2. Click Create.

The Create Competitor page appears.

3. Enter the competitor name in the Organization Name field.

4. You can enter a suffix, such as Ltd. or Co., in the Name Suffix field.

A suffix is automatically appended to the name in the application.

5. Select a threat level. Salespeople can use the threat level to filter their competitor searches.

6. Optionally, enter additional information about the competitor.

Any additional information you enter is only visible in the Competitors work area. Only the competitor name is visible while selecting competitors in opportunities.

7. Click Save and Close.

You can enter additional competitor information when you edit the competitor.

Related Topics

• Managing Sales Competitors: Procedures
• Associating Competitors with Product Groups: Procedure
• Enabling Competitors on Opportunity Product Lines
• Viewing Competitor Information: Procedure
• Associating Competitors with Opportunities: Procedures
## 18 Setting Up Opportunities

### Opportunity Setup Overview

This chapter explains how to configure opportunities and import them. Your sales organization can use opportunities to standardize the sales process from the time a lead gets qualified to the final sale. You can provide salespeople with the best practices at each stage of the sales cycle, forecast sales, and keep track of sales outcomes.

Read the About Configuring Opportunity Behavior and complete the setups outlined in the following table. You can open the setup tasks from the Set Up Opportunities folder implementation project unless noted otherwise.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Configure the sales method you want salespeople to follow. By configuring a sales method, you can provide salespeople with the best practices at each stage of the sale from opportunity creation to close. Within each sales stage, you can set up action items and provide recommended documents, such as collateral to show to the customer. The recommended actions and documents appear in the Sales Coach section of the opportunity UI. The Standard Sales Process sales method supplied by Oracle works without modification. However, you can customize the sales method to suit your needs. You must specify the sales method you want to use in your organization, by setting the system profile option Sales Method Default.</td>
<td>• Manage Sales Methods and Sales Stages • Manage Opportunity Profile Options</td>
<td>See the Configuring Sales Methods and Sales Coach topic in this chapter.</td>
</tr>
<tr>
<td>2</td>
<td>By default, the application requires salespeople to enter win/loss reasons and the primary competitors when they close an opportunity in the UI. If you want to make these entries optional, then you can set the profile options Close Opportunity Win/Loss Reason Required and Close Opportunity Competitor Required to No. For import, you must always include the primary competitor</td>
<td>Manage Opportunity Profile Options</td>
<td>See the Configuring Opportunity Close Behavior topic in this chapter.</td>
</tr>
</tbody>
</table>
### Configuring Sales Methods and Sales Coach

**Video**

Watch: This tutorial shows you how you can use Oracle Sales Cloud to easily modify the supplied opportunity sales methods and sales stages to fit your business requirements.

**About Setting Up Your Sales Methodology for Opportunities**

You can guide salespeople through a structured sales process, called a sales method, as they pursue an opportunity from the initial qualifying stage to closing the deal. At each stage of the sales method, you can list suggested actions, assign tasks, and provide supporting documents and interactive questionnaires.
Oracle provides several predefined sales methods which you can modify to your needs. These include:

- **Accelerated Sales Process**
  A sales process for deals which involve a single decision maker and short time-frame.

- **Standard Sales Process**
  A sales process designed for longer sales cycles, where decisions are made by committee.

Although you can create multiple sales methods for different sales situations and products by following the procedures outlined in the Implementing Sales guide, you can provide one sales method for all opportunities by default. If you want salespeople to choose the sales method they want to use, then you must use Application Composer to display the Sales Method field in the UI. See the Extending Sales guide for details.

The Standard Sales Process, which is appropriate for the high tech company Vision Corp., divides the opportunity sales cycle into the following seven sales stages.

1. Qualification
2. Discovery
3. Building Vision
4. Presentation
5. Agreement
6. Negotiation
7. Closed

For each sales stage, you can specify different options and actions for salespeople to follow, including those listed in the following table. The callout numbers refer to the Edit Sales Stage window regions in the figure following the table.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
<th>Where You Make Your Entries</th>
<th>Callout Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set the default win probability</td>
<td>If you decided to automatically include opportunities in forecasts based on a win probability, then you may want to set a default win probability to ensure that opportunities are not left out of the forecast by accident.</td>
<td>Edit Sales Stage page header</td>
<td>1</td>
</tr>
<tr>
<td>Specify how many days an opportunity can remain in the sales stage before it’s considered stalled</td>
<td>The number of stalled opportunities are highlighted in the Stalled Deals infolet.</td>
<td>Edit Sales Stage page header</td>
<td>1</td>
</tr>
<tr>
<td>Suggest actions and provide supporting documents</td>
<td>Suggest the actions you want salespeople to take and make available any supporting documents they need. These appear in the Sales Coach region in the opportunity UI.</td>
<td>Process Steps and Recommended Documents regions in the Edit Sales Stage page</td>
<td>2 and 4</td>
</tr>
<tr>
<td>Make opportunity fields required.</td>
<td>For example, you may want to make the selection of a sales method required when a salesperson creates an opportunity. For forecasting, you may want to make the Win Probability and Close Date required.</td>
<td>Additional Required Fields region in the Edit Sales Stage page</td>
<td>3</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
<td>Where You Make Your Entries</td>
<td>Callout Number</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Automatically generate tasks, appointments, and other activities.</td>
<td>Activities are generated from the templates you assign to a sales stage and appear in the Activities tab in the opportunity UI.</td>
<td>Activity Templates region in the Edit Sales Stage page</td>
<td>5</td>
</tr>
<tr>
<td>Provide interactive questionnaires, called assessments, to help salespeople make decisions.</td>
<td>Assessments can provide recommendations based on the answers to a set of questions. Assessments are generated from the assessment template you associate with the sales stage and are available in the Assessments tab of an opportunity.</td>
<td>Assessment Templates region in the Edit Sales Stage page</td>
<td>6</td>
</tr>
</tbody>
</table>
The following figure shows a screen capture of the Edit Sales Stage page for a sample sales stage. Callout numbers refer to the different UI regions described in the previous table.

**Suggesting Actions and Documents for the Sales Coach**

The process steps and recommended documents you provide for a sales stage appear in the Sales Coach region of the Edit Opportunity UI. The process steps appear as action items. Salespeople can open documents from the Recommended Documents column.

The following table identifies the two regions on the Sales Coach page highlighted by the callouts in the figure.

<table>
<thead>
<tr>
<th>Sales Coach Region Name</th>
<th>Callout Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Items</td>
<td>7</td>
</tr>
<tr>
<td>Recommended Documents</td>
<td>8</td>
</tr>
</tbody>
</table>
The following figure shows a screen capture of the Edit Opportunity UI for a sample opportunity with the callouts described in the previous table.

The process step name you enter appears as the action item link in the Sales Coach. The text you enter appears as a process step. The following figure shows a partial screen capture of the Edit Sales Stage page highlighting the Process Step region.
The following figure shows how the step you entered appears to users when they click on the action item link in Sales Coach.

**View Action Item: Gather High Level Information**

Your primary goals in this phase is to:

- Interview the prospect
- Determine budget and decision maker executives
- Determine influences
- Discover Competitors in the account
- Determine the buying process of the prospect
- Determine pursuit

Leverage the attached guide and assessment template to determine value.

**Related Topics**

- Adding Task and Assessment Templates to Sales Stages
Creating and Editing Sales Methods and Stages

Use the following procedure to edit an existing sales method, including one of those predefined by Oracle, or to create a new sales method entirely.

Creating or Editing Sales Methods

1. While signed in as a setup user, open the Manage Sales Methods and Sales Stages task from the implementation project. Alternatively, setup users or sales administrators can search for the task by name in the Setup and Maintenance work area.

   The Manage Sales Methods page appears listing the existing sales methods.

2. Edit a sales method by clicking on its name or click Create.

   The Create Sales Method or Edit Sales Method page appears.

3. Unless you are implementing your solution in multiple business units and need to enable different sales methods for different business units, leave the default value of Common Set for the Set field. The Getting Started with Your Sales Implementation guide does not cover the setup of multiple business units.

4. Enter a name for the sales method and an optional description. These entries are not visible to salespeople by default, but can be made visible when you configure the UI.

5. To provide a default close date for opportunities when they are created, enter a number of days in Close Window.

   Create or edit the sales stages for the sales method as described in the following section.

6. Save your changes.

   Note:
   - The Enable Revenue Line Set Capability option is used only for multiple business unit implementations.
   - You can use the Disable option to remove any unused sales methods from use. You cannot delete sales methods after you create them.

Creating or Editing Sales Stages in a Sales Method

Use the following procedure to create or edit sales stages for a sales method.

1. Edit a sales stage by clicking on its name or click Create.

2. Enter basic information about the sales stage, including predefined values for win probability and analytics reports. The following table list and describes the fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Stage name visible in the UI.</td>
</tr>
<tr>
<td>Phase</td>
<td>Select a classification of the sales stage.</td>
</tr>
<tr>
<td></td>
<td>You can define the sales stage phases themselves by using the Manage Sales Stage Phase Codes task from the Setup and Maintenance work area.</td>
</tr>
<tr>
<td>Description</td>
<td>Description visible in the UI.</td>
</tr>
<tr>
<td>Status</td>
<td>Use the status of Open for all stages representing opportunities that are still in progress.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order</td>
<td>Enter a number for the order of this sales stage in the sales method.</td>
</tr>
<tr>
<td>Quota Factor</td>
<td>Enter any number in this field. This number is used only for legacy reports, but entry is required.</td>
</tr>
<tr>
<td>Disable</td>
<td>Select the Disable option to remove any unused sales stages from view. You must not disable sales stages after they are used in opportunities.</td>
</tr>
<tr>
<td>Win Probability</td>
<td>Enter a default win probability for opportunities in this stage.</td>
</tr>
<tr>
<td>Duration</td>
<td>The number of days this stage should last. When an opportunity is in a sales stage longer than the duration, the opportunity is considered stalled. Stalled opportunities appear on the Stalled Deals Infolet and underlying report.</td>
</tr>
<tr>
<td>Stalled Deal Limit</td>
<td>This field is no longer in use.</td>
</tr>
</tbody>
</table>

If you are using win probability as the criterion for including opportunities in forecasts, then having the application prepopulate a win probability ensures that opportunities of the right stages are included in the forecast.

For example, if you are automatically forecasting all opportunities with 70 percent win probability or more, then you can set up the win probability predefined values listed in the following table. This setup ensures opportunities in the Agreement, Negotiation, and Closed stages are included in forecasts.

<table>
<thead>
<tr>
<th>Sales Stage</th>
<th>Win Probability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualification</td>
<td>10</td>
</tr>
<tr>
<td>Opportunity</td>
<td>20</td>
</tr>
<tr>
<td>Building Vision</td>
<td>30</td>
</tr>
<tr>
<td>Presentation</td>
<td>50</td>
</tr>
<tr>
<td>Agreement</td>
<td>70</td>
</tr>
<tr>
<td>Negotiation</td>
<td>90</td>
</tr>
<tr>
<td>Closed</td>
<td>100</td>
</tr>
</tbody>
</table>

4. Upload any documents you want to provide in Sales Coach in the Recommended Documents region.
5. Add any fields you want to make required for opportunities in the Additional Required Fields region.
6. Add any assessment templates you have created in the Assessment Templates region. The assessment templates create interactive questionnaires available in the Assessments tab in the Edit Opportunity page.
7. Add any activity templates you have created in the Activity Templates region. The activity templates can automatically create tasks and appointments which appear in the Activities tab of the Edit Opportunity page.
8. Save your changes.
Setting Default Sales Method Profile Option

You can specify the sales method the application automatically applies to all newly created opportunities by setting the profile option Sales Method Default.

1. Sign in as a setup user or as the sales administrator and navigate to the Setup and Maintenance work area.

   The Setup page appears with an offering selected.

2. In the Setup page, select the Sales offering.

   The Setup: Sales page appears with a list of functional areas.

3. Select the Opportunities functional area.

   A list of required tasks for the Opportunities functional area is displayed.

4. Open the task Manage Opportunity Profile Options.

   The Manage Opportunity Profile Options page appears.

5. In the search region, select Opportunity Management as the application, or just enter the profile option name Sales Method Default directly in the Profile Display Name field.

6. In the search results list, click on the profile option name.

7. Set the profile option to the sales method you want to be the default for newly created opportunities.

   Note: Opportunity and revenue reports and analytics are designed to work with the Standard Sales Process method supplied by Oracle. If you use other sales methods as the default sales method, then you may need to modify your reports.

Configuring Opportunity Close Behavior

About Setting Up Opportunity Closing

Salespeople can close an opportunity when the deal is either won, lost, or abandoned for some reason by setting the opportunity to a closed status.

The following figure shows a portion of Edit Opportunity page to illustrate the default application behavior:

- The application sets the close date to 20 days after the opportunity is created if you did not enter a different period in the Close Window field during sales method setup (callout 1).
When salespeople select one of the closed statuses (Won, Lost, or No Sale) (callout 2), they must enter a win or loss reason and a competitor (callouts 3 and 4).

By setting profile options, you can:
- Make the entry of the win or loss reason optional.
- Make the entry of the competitor optional.
- Set a different number of days for the default opportunity close date.

If you keep the default application behavior, then the setup user or another user with the Sales Administrator job role must create the list of competitors as described in the Setting Up Competitors chapter.

If you make the win or loss and competitor entry optional, the fields remain the Edit Opportunity page. You can use Application Composer to remove them.
Setting the Close Opportunity Profile Options

Using profile options discussed in this topic, you can configure close opportunity behavior.

Close Opportunity Profile Options

The following table shows the profile options that control opportunity close behavior.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close Opportunity Win/Loss Reason Required</td>
<td>Yes</td>
<td>Determines whether, when closing an opportunity, the user is required to enter a win or loss reason. Applies both at the opportunity and revenue item levels.</td>
</tr>
<tr>
<td>Close Opportunity Competitor Required</td>
<td>Yes</td>
<td>Determines whether, when closing an opportunity, the user is required to enter a competitor. Applies both at the opportunity and revenue item levels.</td>
</tr>
<tr>
<td>Opportunity Close Date Default</td>
<td>20</td>
<td>Determines the number of days after an opportunity is created for the initial close date. If you want the application to show a blank close date when an opportunity is initially created, blank out any value in this profile option and ensure the Close Window field in the Edit Sales Method page is blank.</td>
</tr>
<tr>
<td>Opportunity Close Date Retain on Closure</td>
<td>No</td>
<td>Tells the application to retain the old close date even after the status of the opportunity or product line is set to a closed status. If you do not set this profile option to yes, then the close date on the opportunity header or product line is updated with the current date when the opportunity or product line is closed.</td>
</tr>
</tbody>
</table>

Setting the Profile Options

Use the following procedure to find and set the close opportunity profile options.

1. Sign in as a setup user or as the sales administrator and navigate to the Setup and Maintenance work area.

   The Setup page appears with an offering selected.

2. In the Setup page, select the Sales offering.

   The Setup: Sales page appears with a list of functional areas.

3. Select the Opportunities functional area.

   A list of required tasks for the Opportunities functional area is displayed.

4. Search for and select the Manage Opportunity Profile Options task.
The Manage Opportunity Profile Options page appears.

5. In the search region, enter the profile option name in the Profile Display Name field.
6. Click Search.
7. In the list that is returned, click on the profile option name link.
8. Set the profile option value as needed.

Modifying Opportunity Statuses

The application comes with four predefined opportunity statuses: Lost, No Sale, Open, and Won. Use the following procedure to add new statuses or modify the existing ones.

1. Open the Manage Sales Status task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.

The Manage Sales Statuses page appears.

The following figure shows a partial screen capture of the Manage Sales Statuses page.

2. To add a new status:
   
   a. Click Add (the plus sign icon).
   b. Enter a new value in the Status Code field.
   c. Enter a new value in the Status field. This value displays in the opportunity pages.
   d. Select the Active check box.
   e. Select from one of the predefined values for Status Category.

3. You can modify an existing status by selecting its row.
4. Save your changes.
Modifying the List of Win/Loss Reasons

The application comes with predefined win/loss reasons that salespeople select when they close an opportunity. Use the following procedure to add new reasons or modify the existing ones.

The predefined win/loss reasons include:

- Customer not ready
- Good lead
- Install base
- Lost to competition
- Lost to internal development
- Lost to no decision
- No bandwidth
- No budget
- Other
- Price
- Product
- Relationship
- Track record

Use the following steps to modify the win/loss reasons:

1. Open the Manage Set Enabled Lookups task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.

   The Manage Set Enabled Lookups page appears.

2. In the Lookup Type field, enter `MOO_SETID_WIN_LOSS_REASON`.

3. Click Search.
The following figure shows the Lookup Codes region with a few of the preconfigured reasons.

4. You can add a new status in the Lookup Codes region, as follows:
   a. Click **Add** (the plus sign icon).
   b. Enter an internal name in the **Lookup Code** field. No spaces permitted.
   c. Select **Common Set** from the Reference Data Set list.
   d. Select the **Enabled** check box.
   e. Optionally, enter a start and end date.
   f. Enter the wording salespeople see as they close an opportunity in the **Meaning** field.

5. You can modify an existing win/loss reason by selecting its row.

6. Save your changes.

---

**Importing Opportunities**

You can use an Excel macro provided by Oracle to speed up the import of opportunities and their revenue lines. This section explains how to download the macro and the mapping file, populate the macro with your data, and import.

*Note:* You can extend the macro to import additional standard and custom fields. If you do, then you must create a new mapping to use in your import. The steps for customizing macros are not covered in this guide.

**Downloading the Macro and Mapping File for Opportunity Import**

Do the following to download the macro and its mapping:

1. Sign in to support.oracle.com.
2. At the top right-hand side of your screen, search for 2229503.1.
3. In the Details section of the Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1) document, download the two following files from the Excel Macro Files and Mapping Files columns:

<table>
<thead>
<tr>
<th>File Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>R12 Opportunity Quick Import Macro</td>
<td>An Excel macro which you populate with opportunity and revenue line information</td>
</tr>
<tr>
<td>R12 Opportunity Import Macro Mapping</td>
<td>The mapping the application uses for the import.</td>
</tr>
</tbody>
</table>

4. Save both files to a folder on your computer. The macro saves log files to this same folder during your import.

### Uploading the Import Opportunity Mapping File

You must upload the mapping file you downloaded earlier into your application and record the mapping number. The mapping number tells the macro which mapping to use for the import.

Follow these steps to upload the file:

1. While signed in as a setup user, navigate to the Setup and Maintenance work area. Open the Manage File Import Mappings task from the implementation project or after searching for the task by name.

   The Manage File Import Mapping page appears.

2. Click Import Mapping at the top of the page.

3. Click Browse and select the R12 Opportunity Import Mapping file you downloaded.

   The mapping is now listed at the bottom of the page.

4. You must enter the mapping number of this mapping into the opportunity import macro. You can either record the number on the Manage File Import Mapping page by hand, or you can drill down on the mapping name and copy the number to your clipboard from the Edit Import Mapping page.

   The following figure shows the Manage File Import Mapping page with the mapping number highlighted.

![Manage File Import Mapping](image)

### Entering Data into the Opportunity Import Macro and Importing

Enter the data into the macro as follows:

1. Open the R12 Opportunity Quick Import Macro.xlsm file.

2. If you have not enabled macros, then Microsoft Excel warns you that macros have been disabled. In this case, do the following:
   
   a. Click Options.

      The Microsoft Office Security Options window appears.
b. Select the Enable this content option and click OK.

3. In the Mapping field at the top of the macro, enter the mapping number you copied.

4. The currency is set to USD. If you are using a different corporate currency, then enter its code in the Currency Code field.

5. If you customized opportunity statuses, then click the Status worksheet and enter the status codes and statuses in the appropriate columns.

6. If you customized the win/loss reasons, then click the Win/Loss Reason worksheet and enter the codes and values in the appropriate columns.

7. On the Competitors worksheet, click Populate Competitors from Server.

8. In the Login dialog, do the following:
   a. Enter the host name. The host name is in the portion of the URL between https:// and /sales.
   b. Enter the user name and password.
   c. Click Submit.

The Competitors worksheet is populated with the competitors and their IDs as shown in the following figure:

![Populate Competitors from Server](image)

The macro uses this list to validate your entries in the Templates worksheet.

9. In the Template worksheet, enter your opportunity data as described in the following table. Entry is required in the following columns:
   - Opportunity Name
   - Account Number
   - Owner Number
   - Expected Close Date
   - Status
   - Creation Date
   - Last Update Date
Entries in additional columns may be required, depending on your settings and what type of opportunity you are importing.

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Number</td>
<td>Leave this required column blank until you finish entering all of your opportunity data in the Template worksheet. The macro generates the opportunity number automatically using the date and time when you click Generate Opportunity Number. You must generate the opportunity numbers before entering opportunity revenue lines. The opportunity number is used to link the opportunity to the revenue lines and to identify opportunities during updates.</td>
</tr>
<tr>
<td>Opportunity Name</td>
<td>Entry is required. The opportunity name Identifies the opportunity in lists displayed in the Opportunity work area.</td>
</tr>
<tr>
<td>Account Number</td>
<td>Enter the account number. You can copy the account number from macro you used to import accounts.</td>
</tr>
<tr>
<td>Owner Number</td>
<td>Enter the Registry ID of the salesperson who owns this opportunity. You can copy the Registry ID from the file you exported earlier to obtain the owner Party ID. See the chapter on Importing Accounts and Contacts for details.</td>
</tr>
<tr>
<td>Win Probability</td>
<td>Optionally, enter a win probability. Depending on your setup, a win probability can determine if an opportunity is included in a forecast. For example, you can decide to include all opportunities with a win probability greater than 70 percent in your forecasts. See the Setting Up Forecasting chapter for details.</td>
</tr>
<tr>
<td>Expected Close Date</td>
<td>Enter the expected close date in the following format MM/ DD/YYYY The expected close date determines which forecast includes the opportunity. See the Setting Up Forecasting chapter for details.</td>
</tr>
<tr>
<td>Status</td>
<td>Select the status of the opportunity from the list of values or enter one of the statuses manually. For example, Open, Won, Lost, or No Sale.</td>
</tr>
<tr>
<td>Primary Competitor</td>
<td>Select the primary competitor from the list of values or enter one of the valid company names manually. For opportunities with a close date, entry in this field is required.</td>
</tr>
<tr>
<td>Win/Loss Reason</td>
<td>Using the list of values, enter a win or loss reason for a closed opportunity. If you enter an actual close date, then a win/loss reason is required.</td>
</tr>
<tr>
<td>Actual Close Date</td>
<td>For closed opportunities, enter the date the opportunity was closed in the following format MM/DD/YYYY. If you enter a close date, then you must also enter a primary competitor and a win/loss reason even if you specified these are optional in the close opportunity profile options. The import does not respect your selection.</td>
</tr>
<tr>
<td>Creation Date</td>
<td>Enter the opportunity creation date. The required format is YYYY-MM-DD' T'HH:MM:SSSSS which stands for Year-Month-Date'Time'Hour: Min:Sec + UTC. You can enter the date as MM/DD/YYYY and have the macro convert your entry into the required format. For example, your entry 2017/ 01/ 2005 converts to 2017-01-05T00: 00:0000+0000</td>
</tr>
</tbody>
</table>
### Oracle Sales Cloud
Getting Started with Your Implementation

Chapter 18
Setting Up Opportunities

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Update Date</td>
<td>Enter the date the opportunity was last updated. This date field requires the same format as the creation date. You can enter MM/DD/YYYY and have the macro convert your entry to the required format.</td>
</tr>
<tr>
<td>Created By</td>
<td>Enter the Party Number of the user who created the opportunity. You can copy the Party Number from the Registry ID column in the file you exported earlier to obtain the Party ID. See the chapter on Importing Accounts and Contacts for details.</td>
</tr>
<tr>
<td>Last Updated By</td>
<td>Enter the Party Number of the user who last updated the opportunity. You can copy the Party Number from the Registry ID column in the file you exported earlier to obtain the Party ID. See the chapter on Importing Accounts and Contacts for details.</td>
</tr>
</tbody>
</table>

10. Click **Generate Opportunity Number**.

The macro creates the opportunity numbers.

11. Click the **Revenue Line** worksheet and the revenue lines for the opportunities you entered. Each line represents one opportunity revenue line. You can enter multiple lines for each opportunity. The columns are described in the following table.

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Number</td>
<td>Enter the opportunity number linked to the revenue line you are entering. You can copy the number from the Opportunity Number column in the Template worksheet.</td>
</tr>
<tr>
<td>Revenue Number</td>
<td>Leave this column blank. This unique identifier for the revenue line number is automatically populated by the macro when you initiate the import by clicking <strong>Generate Import Activity</strong>.</td>
</tr>
<tr>
<td>Product Group Internal Name</td>
<td>This column identifies the sales catalog product group the customer is interested in purchasing. Enter the Product Group Reference Number from the macro you used to import product groups. See the Setting Up the Sales Catalog chapter for details. Each revenue line can have either a product group or a product. You cannot enter both.</td>
</tr>
<tr>
<td>Product Number</td>
<td>This column (D) is hidden in the macro. You can enter the Product Number to indicate the specific sales catalog product the customer is interested in purchasing. You can copy the product number from the product import macro you used earlier or you can view the product numbers in the Products work area. You cannot enter a product if you entered a product group. A revenue line cannot have both.</td>
</tr>
<tr>
<td>Quantity</td>
<td>Enter the number of products or product groups that the customer is interested in.</td>
</tr>
<tr>
<td>Estimated Price</td>
<td>Enter the estimated price per unit for the product group or product.</td>
</tr>
<tr>
<td>Amount</td>
<td>Leave this column blank. The macro automatically calculates the amount when you import.</td>
</tr>
</tbody>
</table>

12. When you are done with your entries, click the **Template** worksheet and click **Create Import Activity**.

The Login dialog appears displaying the host name, user name, and password you entered earlier.

13. Click **Submit**.
14. If the You must correct errors in your entries message appears, then:

   a. Click OK

      The Error worksheet displays your errors.
   b. Click each error link in column D and make the correction on the Template worksheet.

   Note: After you correct an error, you must click outside the field for the correction to be recognized.

   c. Click Create Import Activity and Submit again.

15. If the macro data is validated without errors then, the macro displays one of the messages listed in the following table:

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted</td>
<td>Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>successfully.</td>
<td></td>
</tr>
<tr>
<td>Unable to connect to the server at this time.</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>Unable to submit the file import activity.</td>
<td>You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors work sheet to view the error details.</td>
</tr>
<tr>
<td>Check log for details.</td>
<td></td>
</tr>
</tbody>
</table>

16. If your import activity was submitted successfully, then click Activity Details.

   The Activity Details window appears, listing the import activity name, its ID and its status.
   
   o If the import activity is still in progress, you can refresh the status periodically by clicking Refresh.
   o If your import completed successfully, then the status listed is Completed.

17. Optionally, click Generate Log to save a file listing the opportunities that were imported.

Validating the Imported Opportunities

You can validate the opportunities you imported using advanced search in the Opportunities work area as follows:

1. Sign in as a salesperson with the Sales Administrator job role. Sales administrators have broad access to sales data.
2. Navigate to the Opportunities work area.
3. Click Advanced Search (the filter icon highlighted with callout 1 in the following figure).
The Advanced Search panel appears.

4. From the **Saved Search** list, select **Close Date** (callout 2).
5. From the **Close Period** list, select **All** (callout 3).
6. In **Close Date**, enter a period which covers the close dates you imported. (callout 4).
7. Click **Search**.

The list of opportunities appears matching your criteria.
19 Setting Up Oracle Social Network

About Setting Up Oracle Social Network

If you want users to easily share information on opportunities, accounts, and other sales objects, then you must enable the Oracle Social Network for Oracle Sales Cloud for those objects and specify which attributes you want to display on the wall. 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 to discuss projects, plans, and issues. Everyone can benefit from the collective experience and make better-informed business decisions.

When a record is shared, the application automatically generates a wall and displays the object attributes that you select during the setup. Any changes in the attributes for the shared record are automatically listed on the wall. The following figure shows a screen capture of the Social tab showing the wall for the fictitious Server Upgrade opportunity.

Oracle Sales Cloud users with access to the opportunity can join the conversation in the Social tab of the record and invite others.

All users who are part of the conversation, including those without access to the opportunity record or to Oracle Sales Cloud, can access what’s posted on the wall either through the Social work area in Oracle Sales Cloud or through the Oracle Social Network UI.

The following figure shows a screen capture of the same opportunity information as seen in the Social work area of Oracle Sales Cloud.
You can automatically share and create a wall for all records or require salespeople to share individual records manually by clicking **Share** on the Social tab. Oracle recommends that you set objects to be shared manually.

The following figure shows the Social tab when you select the manual option, before the opportunity is shared. The tab displays a message that the opportunity is not shared and the **Share** button.
Enabling Objects for Sharing on Oracle Social Network

Use the procedures in this topic to enable objects for sharing on Oracle Social Network and to specify which object attributes are displayed on the conversation wall.

Enabling an Object

To enable an object, do the following:

1. While signed in as a setup user, open the task **Manage Oracle Social Network Objects** from the implementation project. Alternatively, you can search for the task by its name in the Setup and Maintenance work area. The Manage Oracle Social Network Objects page appears.
2. Scroll down to one of the appropriate groupings for the object you want to share and expand the grouping. The following table lists key sharable objects and the groupings where they’re located. You can only share information for objects you have implemented.

<table>
<thead>
<tr>
<th>Grouping</th>
<th>Object Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applications Common Components</td>
<td>Activity</td>
</tr>
<tr>
<td>Common CRM</td>
<td>Business Plan</td>
</tr>
<tr>
<td>Enterprise Contracts</td>
<td>Contract</td>
</tr>
<tr>
<td>Lead Management</td>
<td>Sales Lead</td>
</tr>
<tr>
<td>Mobile Sales</td>
<td>Activities Public</td>
</tr>
<tr>
<td>Opportunity Management</td>
<td>Opportunity</td>
</tr>
<tr>
<td>Partner Management</td>
<td>Partner</td>
</tr>
<tr>
<td>Sales</td>
<td>Reference</td>
</tr>
<tr>
<td>Sales</td>
<td>Sales Competitor</td>
</tr>
<tr>
<td>Service</td>
<td>Service Request</td>
</tr>
<tr>
<td>Trading Community Model</td>
<td>Account</td>
</tr>
<tr>
<td>Trading Community Model</td>
<td>Contact</td>
</tr>
<tr>
<td>Trading Community Model</td>
<td>Household</td>
</tr>
</tbody>
</table>
3. Select the object and click Enable Object.
   The Enable Object window appears.
4. Select either the Manual or the Automatic option and click OK.
   Manual, the recommended setting, requires the salesperson to share each record manually. The Automatic setting automatically shares each record and creates the discussion wall.
5. On the Manage Oracle Social Network page, click Save.
   You must now enable attributes for the object.

Enabling Object Attributes
To enable object attributes, do the following:

1. Under Business Objects, select the object that you want to enable attributes for.
2. Under Attributes, click New.
   A list of attributes for the object appears.
3. Select the Enabled option for the attributes that you want to appear on the wall for the object.
4. Click OK.
   The No Warnings icon (a green check mark) appears in the object’s Status column.
5. Click Save.
   A confirmation message appears showing the progress of the setup process.
6. When the process is complete, click OK.

Validating Your Changes
To verify that you have enabled an object for sharing on Oracle Social Network, navigate to any record for the object to see whether the record displays the Social tab at the bottom of the page.

The following figure shows a partial screen capture of the tabs on the page with the Social tab highlighted.

Related Topics
- Oracle Sales Cloud Social Network Administration: Overview
20 Setting Up Sales Quotas

About Setting Up Sales Quotas

You can set up quotas and use them to measure the achievement of your sales teams by comparing the quotas to actual metrics such as revenue. This chapter covers the basic setup for quota management using the UI only. It doesn’t cover quota import or advanced quota calculation features.

Prerequisites

You must complete the following before you can set up sales quotas:

1. Set up the accounting calendar for Oracle Sales Cloud as covered in the Setting Up the Accounting Calendar chapter. Quotas can be set for the year as well as for periods defined in the calendar. After the calendar is set up you can add years to it, but any other changes to the calendar can break quota features. A report calculated by time period is one example.

2. Set up sales territories as described in the Setting Up Sales Territories and Assignment chapter. Each salesperson eligible to receive a quota must be assigned to an active territory. Quota calculations rely on territory coverage. If you plan to use quota calculations, then make sure territories have dimensional coverage defined.

Setup Overview

Perform the following tasks to set up sales quotas:

1. Optionally, create seasonality factor groups.

   Seasonality applies percentages to split a quota over months or quarters to factor in seasonal fluctuations. Seasonality factor groups can be associated with quota plans or specific territories to account for variations in sales seasonality among different territories. Instead of entering quotas for each period of the year, you could rely instead on seasonality to split your annual quota into period quotas.

   For details, see the Creating the Seasonality Factor Groups section in this chapter.

2. Create a sales quota plan for your fiscal year. One plan per fiscal year is required for tracking quotas for the entire territory hierarchy for that fiscal year.

   The quota plan must be activated before you can allocate sales quotas. For details, see the Creating a Sales Quota Plan topic.

3. Allocate sales quotas starting from the root territory down the sales territory hierarchy.

   For details, see Allocating Sales Quotas.

4. Optionally, create a sales goal to track sales volume or sales visits or any company-defined quota.

   For details, see Creating a Sales Goal.
Setting Up Sales Quotas

You can create seasonality factors to automatically split yearly quota into period quotas according to known seasonal fluctuations. You will also create a sales quota plan for the year and begin the quota setting process.

Create Seasonality Factor Groups

Follow these steps to create seasonality factor groups for a given year. The groups are useful when your territories have different seasonality expectations. The sum of all seasonality factors must total 100 percent. You can create more than one seasonality group.

1. Sign in as a setup user or sales administrator.
2. Open the Manage Sales Quota Seasonality Groups task from the implementation project. Alternately, you can search for the task by name in the Setup and Maintenance work area. The Manage Seasonality Factor Groups page appears.
4. In the Seasonality Factors region, enter the factor percentages for time periods, as shown in this table. Percentages must add up to 100.

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Factor Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quarter 1</td>
<td>10</td>
</tr>
<tr>
<td>Quarter 2</td>
<td>20</td>
</tr>
<tr>
<td>Quarter 3</td>
<td>30</td>
</tr>
<tr>
<td>Quarter 4</td>
<td>40</td>
</tr>
</tbody>
</table>

5. Click **Save and Close**.

Create a Sales Goal

A sales revenue goal is the target revenue expected from a salesperson. This goal is automatically assigned to every territory owner during the annual quota planning process. You can use the following steps to create additional sales goals, such as sales volume or sales visits, if you want to assign other types of quotas to your salespeople.

1. While signed in as a setup user, open the Manage Sales Goals task from the implementation project. Alternatively, sales administrators can open the task from the Quotas work area.
2. In the Search Results region, click **Create**.
3. Name the goal **Sales Volume**.
4. Add the description: **Number of products sold**.
5. For **Unit of Measure**, select **Quantity**.
6. Save and close.
Create a Sales Quota Plan

Follow these steps to create a sales quota plan:

1. While signed in as a setup user, open the **Manage Sales Quota Plans** task from the implementation project. Alternately, setup users and sales administrators can navigate to the Quotas work area and click the task name there. The Manage Sales Quota Plans page appears.
2. Click **Create**.
3. In the Sales Quota Plans table, enter the sales quota plan information, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Fiscal Year 2017 Sales Plan</td>
</tr>
<tr>
<td>Description</td>
<td>Corporate Sales Quota Plan for Fiscal Year 2017</td>
</tr>
<tr>
<td>Year</td>
<td>2017</td>
</tr>
<tr>
<td>Calculate Default Territory Quota</td>
<td>Deselect. If selected, the application calculates the quotas for each of the territories using the default territory quota formula.</td>
</tr>
<tr>
<td>Track</td>
<td>Select. Only one plan can track quotas for the year.</td>
</tr>
<tr>
<td>Copy Quotas From</td>
<td>Leave Blank. After creating your first sales quota plan, copy a previous plan for a quick way to create a new plan.</td>
</tr>
</tbody>
</table>

The following figure shows the Create Sales Quota screen with the example data.

4. Click **Save and Close**.
5. In the Details region, on the Options tab, select Standard for the **Seasonality Factor Group** field you created earlier.

The following figure shows the Sales Quota Plan Options region of Manage Sales Quota Plans.

6. Click **Save**.

7. With your new quota plan selected in the list of plans, click the **Activate** button.

   The Enter Activation Date dialog box appears.

8. Set the activation to right now plus a few minutes in the future.

9. Click **OK**.

   The initial status is Pending Activation. You must refresh the page to verify that the status has changed to Active.

10. Upon activation, sales managers can sign in to the application and begin allocating quotas to their teams. Click **Synchronize** if you suspect the territory hierarchy for quotas isn't current.

## Allocate Sales Quotas

Use the following steps to allocate sales quotas to territories. You must allocate quotas to each territory from the top of the territory hierarchy down. You can allocate a quota to a territory only after you allocate the quotas for all the territories higher in the territory hierarchy.

1. You are signed in as the setup user. A sales administrator can also perform these steps.

2. In the Navigator, click **Quotas**.

3. The Manage Sales Quotas page appears. If not already selected, select your recently created and activated quota plan: **Fiscal Year 2017 Sales Plan**.

4. In the Edit Sales Quotas region, verify that the territory quotas and owners’ quotas are zero.

5. If not already selected, select the **US Product Sales** territory, which is the root territory in the hierarchy.

6. Enter a territory quota amount and a resource quota amount for the year for the whole US Product Sales organization. Enter a territory quota amount and a resource quota amount for the year for the whole US Product Sales organization. Enter **20,000,000**.

7. Click **Publish** and verify that the status changed from Not Published to Published.

8. For each child territory of the US Product Sales territory, enter a territory quota amount and an owner’s quota amount as shown in the following table:

<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Territory Quota and Owner’s Quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central</td>
<td>10,000,000</td>
</tr>
</tbody>
</table>
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Setting Up Sales Quotas

<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Territory Quota and Owner’s Quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>East</td>
<td>5,000,000</td>
</tr>
<tr>
<td>West</td>
<td>6,000,000</td>
</tr>
</tbody>
</table>

9. Select the parent territory Product Sales and click **Details** for the territory.
   The Details table shows the rollup total for the child territories and the variance from the US Product Sales quota.

10. Click **Save**.

11. Click the Territory Quota tab and verify that as part of the publish process, seasonality was automatically applied to split the annual quota into period quotas.

12. Select the West territory and do the following:
   a. On the Territory Quota tab, enter quotas for each period. They must add up to the annual quota amount.
   b. On the Resource Quota tab, enter period quota amounts for the Sales Revenue Goal for the owner of the territory.
   c. In the Resource Quota table, click **Add Row**.
   d. From the **Resource Name** list, select the owner of the territory.
   e. Select the sales goal **Sales Volume**.
   f. Enter a quota quantity for the sales volume goal, 12,000,000. The start and end dates are automatically applied.
   g. Click **Apply Seasonality**.
   h. The factors for the Standard seasonality group display. Click **OK**.
      The West seasonality factors are applied to the quantity you entered and are distributed over time periods.
   i. You can publish at this point, but for now click **Save and Close**.

13. In the Manage Sales Quotas page, select the **West** territory and click **Publish**.

   **Note:** If the Publish button is disabled, this could be the result of one of the following:
   o You did not publish the parent territory.
   o You must own the parent territory in order to publish a quota.
   o The territory is excluded. To see if a territory is excluded, select **Columns, Exclude** from the **View** menu in the Edit Sales Quotas region.
   o The territory was already published. You cannot republish a territory at the bottom of the hierarchy.

14. Verify that the status is Published.
   The application notifies the territory owner and the analyst that the territory was published.

15. Click **Save**.
   The following table lists common publishing errors and their solutions.

<table>
<thead>
<tr>
<th>Error</th>
<th>Steps to Resolve</th>
</tr>
</thead>
<tbody>
<tr>
<td>You cannot publish quota for the territory West because the territory has revenue quota assigned prior to the territory quota start date.</td>
<td>a. Select the parent territory of West. In this example, this is US Product Sales.</td>
</tr>
<tr>
<td></td>
<td>b. Click <strong>Details</strong> to navigate to Edit Sales Quotas page.</td>
</tr>
<tr>
<td></td>
<td>c. Select the territory West.</td>
</tr>
<tr>
<td></td>
<td>d. Select the Territory Quota tab.</td>
</tr>
</tbody>
</table>
### Error and Steps to Resolve

#### The total quota of all quarters for the territory West must be equal to the annual quota 100,000 US Dollars.

- **a.** Select US Product Sales, the parent territory of West.
- **b.** Click Details to navigate to Edit Sales Quotas page.
- **c.** Select the territory West.
- **d.** Select the Territory Quota tab.
- **e.** Update the period quotas so their sum equals the territory quota.

#### The sales goal Sales Volume quota for the resource Mateo Lopez of the West territory should be greater than zero.

- **a.** Select US Product Sales, the parent territory of West.
- **b.** Click Details to navigate to Edit Sales Quotas page.
- **c.** Select the territory West.
- **d.** Click the Resource Quota tab.
- **e.** Locate the Resource Quota related to the Sales Volume for Mateo Lopez.
- **f.** Update the quota amount to be greater than zero.

#### The total quota for all quarters for resource Mateo Lopez for sales goal Sales Volume in territory West must be equal to the annual quota 100,000 US Dollars.

- **a.** Select US Product Sales, the parent territory of West.
- **b.** Click Details to navigate to Edit Sales Quotas page.
- **c.** Select the territory West.
- **d.** Click the Resource Quota tab.
- **e.** Ensure that the period quotas add up to the annual quota for the Sales Volume goal for Mateo Lopez.

---

### Scheduling Quota Processes

Your active quota plan needs to reflect the latest territory hierarchy. Sales managers or administrators frequently make changes to active territories directly, using territory proposals, or through web services. Only if you update territories using a territory proposal are the territory hierarchies synchronized automatically. Schedule synchronization to run frequently to provide the latest structure for allocating quotas.

Perform the following steps to schedule the Synchronize Quotas process to run daily.

1. If you are using the implementation project provided with the Getting Started with Your Oracle Sales Cloud Implementation guide, then open the Synchronize Quotas task from the project.
2. If you are not using the implementation project, then do the following:
   - **a.** Sign in as a setup or sales administrator user.
   - **b.** Open the navigator.
   - **c.** In the Tools menu section, click Scheduled Processes.
   - **d.** Click Schedule New Process.
     - The Schedule New Process dialog appears.
   - **e.** For the Type field, select Job.
f. In the name field list, click Search.
g. Search for Synchronize Quotas.
h. Select Synchronize Quotas and click OK.

The Process Details page appears.

3. In the Parameters region, select the sales quota plan.

4. Click Advanced.

5. In the Schedule tab, select Using a schedule.

6. Select the Daily frequency.

7. Change the start date to when you want to start running the process, and select the time of day when you want it to run.

8. Change the end date to a future date.

9. Click Customize Times if you want to remove or add specific dates to those the application calculates.

10. Use the Notification tab to add notifications to specific people when the process completes.

11. Click Submit.
21 Setting Up Forecasting

Setup Overview

Your sales organization can automatically forecast opportunities by sales territory within each forecasting period and managers can adjust those forecasts as required. During setup you can specify the forecasting windows and set other parameters for your organization.

Before you can set up the forecasting, you must complete the following steps:

- You must set up the accounting calendar as described in the Setting Up the Accounting Calendar and Corporate Currency chapter.
- You must create your sales territory hierarchy. Oracle recommends setting the profile option Assignment Submission at Save Enabled (MOO_OPTY_ENABLE_AUTO_ASGN) to Yes, as described in the Setting Up Sales Territories and Assignment chapter. Forecasts are generated by territory and roll up the territory hierarchy. The owner of a territory submits a forecast to the owner of the parent territory.

Read the About Forecasting topic and complete the setups outlined in the following table. You can open these setup tasks from the Define Sales Forecasting Configuration folder in the implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>On the Select Forecasting Options page you:</td>
<td>Select Forecasting Options</td>
<td>See the Generating Forecast Submission Windows and Setting Forecasting Options topic in this chapter.</td>
</tr>
<tr>
<td></td>
<td>• Generate the forecast dates and forecast submission windows your organization will use. This task is required.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Specify criteria for including opportunities in the forecast.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Enable managers to adjust forecasts by product group rather than by territory.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>If you enabled forecast adjustment by product group, then you can enable managers to adjust the forecasts by the quantity of products in addition to revenue.</td>
<td>Manage Standard Lookups</td>
<td>See the Enabling Forecast Adjustments By Product Quantity topic in this chapter.</td>
</tr>
<tr>
<td></td>
<td>To enable the quantity adjustment, you use the Manage Standard Lookups task to edit the ORA_ZSF_SHOW_METRICS lookup type and enable the ORA_QUANTITY lookup code.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### About Forecasting

Your sales organization can automatically forecast opportunities by sales territory within each forecasting period and managers can adjust those forecasts as required. In the Select Forecasting Options page, you specify how far in advance and how frequently you want to forecast and generate the forecasting submission windows during which your sales organization can adjust forecasts.

### What's Included in a Forecast

The application automatically includes in each forecast all won opportunities in a sales territory with close dates that fall within the forecast period. Lost opportunities are never included in forecasts. Only sales territories that have the Forecast Participation attribute set to revenue can participate in forecasts.

You can forecast additional opportunities that meet the criteria you specify in the Unadjusted Forecast Criteria region of the Select Forecasting Options page. For example, you can decide to include all opportunities with a win probability greater than 70 percent.

You can set up your Sales Method to ensure that opportunities are not left out because of incomplete data entries. For example, you can make entries in the Win Probability and Close Date fields required for the later stages of the sales process and you can have the application automatically prefill the win probabilities themselves when salespeople move an opportunity to a particular sales stage.

By entering a default of 70 percent for opportunities in the Agreement sales stage, for example, you ensure that all opportunities in the Agreement stage are included unless sales representatives change the win probability manually.

You can also configure opportunities to always assign territories when they are saved, to ensure that a sales territory is always associated with the opportunity. You assure territory assignment by setting the profile option Assignment Submission at Save Enabled (MOO_OPTY_ENABLE_AUTO_ASGN) to Yes as described in the Setting Up Sales Territories and Assignment chapter.

Each user who participates in the forecasting process must own a sales territory, or be delegated forecasting visibility into a territory. By default, the application creates one forecast for all opportunity revenue line items. You can enable forecasting on individual line items separately by following instructions in the Implementing Sales guide.

### Sales Representative Forecasts

Sales representatives navigate to the forecast they want to review on the Forecasts work area landing pad.

The following figure shows a screen capture of the Forecasts work area landing pad page with sample data. The page displays a bar chart showing the amounts for forecasts, won revenue, and open pipeline. The page also displays an indicator showing in percentage of quota attainment with
a numeric summary. The page indicates if the forecast is submitted, how it was changed, and how much pipeline remains to be submitted.

Clicking **Review** displays the list of opportunities included in the forecast for the assigned territory within the active forecast time period.

The following figure shows a screen capture of a Review Sales Forecast page with sample data for the salesperson's territory. The information includes information about the forecast amounts, the forecast window, won revenue, and open pipeline. The page also includes links to opportunities includes in the forecast.
Sales representatives edit any of the opportunities by clicking their names.

While editing opportunities, salespeople can manually exclude or include opportunities from the forecast by altering the win probability and the close date. If enabled on the Select Forecasting Options page, users can also make a selection from the **Include in Forecast** list.

The following figure shows a screen capture of the Edit Opportunity page. Callout 1 shows the location of the Include in Forecast list.
When sales representatives are satisfied with their forecast numbers, they click **Submit** on the Review Sales Forecast page. Submitting a forecast takes a snapshot of the opportunity information in the forecast and indicates to managers that they can review and adjust the forecast.

**Sales Manager Forecast Review and Adjustment**

Managers navigate to the forecast period they want to review on the Forecasts work area landing pad and click **Edit**. Managers are users who own a parent sales territory that has one or more child territories rolling up through the territory hierarchy. Managers can adjust forecasts on dates that fall within one of the forecast submission windows you generate on the Select Forecasting Options page.

The following figure shows a screen capture of the Forecasts work area landing pad page and sample data for a manager. The page is very similar to the page a salesperson sees.

On the Edit Forecast page Territories tab, managers can view at a glance which subordinates have submitted their forecasts and the trend of the latest updates.

The following figure shows a screen capture of a section of the Edit Forecast page for a manager. A green check mark, indicates a salesperson submitted her forecast (highlighted by callout 1). A green up arrow (callout 2) indicates she revised it upwards since her last forecast.
Depending on your setup, managers adjust the submitted forecasts either by territory on the Territories tab (the default) or by product on the Products tab.

If you want to have managers adjust forecasts by product rather than territories, then you must enable the Products tab on the Select Forecasting Options page. If you do not enable the Products tab, then it does not appear in the Edit Forecast page at all.

Regardless of setup, managers can always adjust opportunity lines on the forecast items tab. The adjustments to forecast items are then reflected on the territories and products tabs.

The following figure shows a screen capture of the Products tab on the Edit Forecast page. The image shows a sample sales catalog hierarchy, which extends four-levels down to the individual product. Callout 1 highlights a product forecast line selected for adjustment.
Although you can enable adjustment at any product group level in your sales catalog, Oracle recommends enabling one level only. Enabling one level makes it possible to adjust forecasts for all the product groups immediately below your root catalog level. The adjustments that managers make are visible to themselves and to their own managers after they submit their forecasts.

By default, product group forecast adjustment is by revenue, but you can enable forecast adjustment by the quantity of products in a product group. See Enabling Forecast Adjustments By Product Quantity topic for details.

The following figure shows a screen capture of the Edit Forecast page Products tab with the forecast adjustment by quantity enabled. The page shows forecast quantities instead of dollar amounts.
The adjustments are highlighted by icons with details available on hover. The sales managers see their own adjustments.

The following figure shows a partial screen capture of a forecast seen by a manager with the window which displays on hover for an adjusted forecast.
Managers higher up the management chain see their own adjustments and those made by their subordinates. The following figure shows a partial screen capture of a sample forecast with the window showing the amount adjusted by subordinates and the unadjusted forecast amount.
Generating Forecast Submission Windows and Setting Forecasting Options

You can set up sales forecasting to match your business practices by setting the different options on the Select Forecasting Options page. You can specify how far in advance and how frequently you forecast and generate the forecasting submission windows during which your sales organization can adjust forecasts using the Edit Forecast page, for example. You can also enter the criteria the application uses to determine which opportunities to include in a forecast and you can permit adjustments by product or by territory.
Select Forecasting Options Page Overview

The following table highlights the different regions on the Select Forecasting Options page shown in the figure and provides an overview of the entries described in detail in the sections that follow.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Region Name</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Forecast Period Parameters</td>
<td>Enter the parameters that the application uses to generate the dates for each forecast and the forecast submission windows. During each window, your sales organization can update the forecast for the current period. Usually this window starts right after the last forecasting call with sales management and ends just before the next one. At the end of each window, the application takes a snapshot of your organization's forecasts so the forecasts are ready for your call. When you click Submit, the generated submission windows are displayed in the Scheduled Forecasts region where you can adjust them to conform with your actual forecasting schedule. The automatically generated submission windows are approximations only, so you must adjust the dates manually.</td>
</tr>
<tr>
<td>2</td>
<td>Unadjusted Forecast Criteria</td>
<td>Specify the criteria the application uses to determine which opportunities to include in the forecast.</td>
</tr>
<tr>
<td>3</td>
<td>Summary Tab</td>
<td>Specify if you want sales managers to adjust forecasts by product group or by territories. By default, managers can adjust forecasts by territories. Adjustment by product group is not available unless you enable the Products tab.</td>
</tr>
<tr>
<td>4</td>
<td>Metrics</td>
<td>This region is used for setting options for specifying what metrics show up in legacy desktop UIs. These UIs are not available to new customers. New customers must use Application Composer to modify forecasting UIs.</td>
</tr>
<tr>
<td>5</td>
<td>Scheduled Forecasts</td>
<td>The application displays the generated forecast submission windows in this region. You must manually adjust the dates of each submission window as needed.</td>
</tr>
</tbody>
</table>
Creating the Forecast Submission Windows

You generate the forecast submission windows on your calendar by entering parameters in the Forecast Period Parameters region. Each submission window controls application behavior. The following figure shows submission windows at the beginning of each month. Each submission window:

- Starts on a **Territory Freeze Date** (indicated by callout 1 in the figure)
- Ends on the forecast **Due Date** (callout 2)

Before each freeze date:

- The forecast is read only.
Changes to the territory and product hierarchy are synchronized to the forecast.

Changes to revenue items are synchronized to forecast items.

After each freeze date:

- Sales users can edit, adjust and submit forecasts.
- Changes to revenue items are synchronized to forecast items.
- Salespersons must adjust and submit their forecast between the Territory Freeze Date and the Due Date.

After sales representatives submit their forecasts, they cannot edit them, but the forecasts can be adjusted by managers. After the due date is reached, each forecast becomes read-only.

To generate the forecast submission windows:

1. In the Forecast Period Parameters region, enter the options that the application will use to generate forecasts and the approximate forecast submission windows.

The following figure shows the Forecast Period Parameters region on the Select Forecasting Options page.
The following table describes the options and suggested values for submitting monthly forecasts for the current quarter.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
<th>Suggested Values for Forecasting Monthly During the Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forecast Period</td>
<td>Typically a quarter. Each forecast includes only those opportunities set to close in the forecast period.</td>
<td>Select Quarter.</td>
</tr>
<tr>
<td>Adjustment Period</td>
<td>This read-only field displays the type of period you selected when you set up your accounting calendar. Typically and for Vision Corp. this is a month.</td>
<td>This field is not editable.</td>
</tr>
<tr>
<td>Forecast Frequency</td>
<td>Enter the number of submission windows you want to generate for each forecast period.</td>
<td>Because you are holding a forecasting call each month and there are three months in each quarter, enter 3.</td>
</tr>
</tbody>
</table>
| First Forecast Due Date| The date you want the first submission window to end relative to the forecast period. The application takes the forecast snapshot at the end of the day. | If you want the first forecast submission window to end on the last day of the first month in each quarter, then enter 31 in the First Forecast Due Date field and select the After the forecast period start date option.  
The application generates the subsequent submission windows based on the number of days you enter here and in the Territory Freeze Date field, but because each calendar month has a different length, entering 31 generates submission windows with some overlap.  
During overlapping submission windows sales representatives and their managers see two forecast submission windows, but you can choose to ignore these overlaps or adjust the dates after you generate the scheduled forecasts.  
Forecasting periods can overlap and can have gaps, but any gaps result in periods where users cannot submit or edit their forecast. |
| Territory Freeze Date  | The number of days before the end date that you want the submission window to start.  
Any sales territory changes after this freeze date are ignored and applied only to subsequent forecasting windows. | Because you want your forecast submission windows to start at the beginning of each month, enter 31. |
2. Click **Submit**.
3. Dismiss any warning messages.
4. Click **Yes** on the confirmation message that your forecast generation process was submitted.

You are returned to the Setup and Maintenance work area while the forecast submission window generation is in process.

5. Click the **Select Forecasting Options** task link again.

The Select Forecasting Options page shows the status of the period generation process. The status does not refresh automatically, so you may have to click **Cancel** to return to the Setup and Maintenance work area and try again later.

When the process completes, the generated submission windows appear in the Scheduled Forecasts region. The windows will look similar to what’s included in the following table.

- The Forecast Name
  - The system-generated name for each submission window.
- Start Date
  - The start date of the forecasting period, the beginning of the quarter.
- End Date
  - The end date for the forecasting period, the end of the quarter.
- Territory Freeze Date
  - The start date for the forecast submission window.
- Due Date
  - The end date for the forecast submission window, the period when the sales organization can adjust forecasts. At the end of this date the application takes a snapshot of the forecast and opens a new window. The forecast is frozen on the due date regardless if users click the submit button. After the due date passes, the active forecast is marked as past, and the next forecast is marked as active.

<table>
<thead>
<tr>
<th>Forecast Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Territory Freeze Date</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q3-2015 - 2015/08/01</td>
<td>7/1/2015</td>
<td>9/30/2015</td>
<td>7/1/2015</td>
<td>8/1/2015</td>
</tr>
</tbody>
</table>
**Oracle Sales Cloud**

**Getting Started with Your Implementation**

**Chapter 21**

**Setting Up Forecasting**

<table>
<thead>
<tr>
<th>Forecast Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Territory Freeze Date</th>
<th>Due Date</th>
</tr>
</thead>
</table>

**Note:** If you are in the middle of a quarter, for example Q3, the application may only generate one or two scheduled forecasts for that quarter.

6. Because the periods are generated based on a fixed number of days you entered as parameters and the number of days in a month varies, you must modify the start and end dates of each submission window by entering new dates in the **Territory Freeze Date** and **Due Date** fields. You must not leave any gaps between dates if you want the sales organization to update their forecasts at any time.

**Note:** The application automatically generates new submission windows at the end of each quarter. You must continue to manually adjust these windows as they are generated.

7. Click **Submit** when you are done.

**Setting Forecasting Criteria**

To set forecasting criteria:

1. In the Unadjusted Forecast Criteria region of the Forecast Options page, shown in the following figure, specify the opportunity win probability that will trigger inclusion of an opportunity in the forecast.

   **Note:** By default, the win probability and close date are set at the opportunity level. If you want to forecast at the level of individual revenue lines, then you must expose the win probabilities for the lines in the Edit Opportunity page using Application Composer.

   a. Select **Probability** from the first list. Although other criteria are available, you will want to forecast based on the opportunity win probability.
   b. Select **Greater than or equal to** or another operator from the second list.
   c. Enter the probability, for example, 70.

You may want to specify the probability that matches the default probability of the appropriate sales stage in your sales method. For example, if you want all opportunities in the Agreement sales stage or in a later sales...
stage to be included, and the default win probability is 70 percent for that sales stage, then you want to enter 70.

2. Select the Enable Forecast Criteria Override option. Selecting this option makes it possible for salespeople or their managers to include or exclude an opportunity from a forecast regardless of its win probability by making a selection from the Include in Forecast list while editing an opportunity as shown in the following figure.

If you do not want users to use this list, then you must hide this field on the opportunity UI by using Application Composer. Leaving the Enable Forecast Criteria Override option unselected, does not by itself prevent users from making a selection from the list.

Note: Even when you disable the Include in Forecast list, users can always edit an opportunity to exclude it from the forecast, for example, by entering a different win probability.

3. Leave the Enable nonrevenue forecasting option unselected unless you want to generate separate forecasts for overlay territories.

Enabling Forecast Adjustments by Product

To enable forecast adjustments by product:

1. Select the Enable Product Totals option if you want to enable users to adjust forecasts by product rather than by territories (the default). Selecting this option displays the Products tab in the Edit Forecasts window where users can make the adjustments. See callout 1 in the figure at the beginning of this topic.

2. If you selected the option, then specify the number of sales catalog levels you want to edit in the Products tab, by making a selection from the Product Hierarchy Depth list. To improve usability, Oracle recommends setting the
depth to 1 unless there is a compelling business need to break the forecast out beyond the first level of the product group hierarchy.

### Product Tab

- **Enable Product Totals**
- **Product Hierarchy Depth**: 1

---

**Enabling Adjustment Notes and the Forecast Trend Graph**

The Forecasts landing page displays a Forecast Overview chart that compares your forecast with won revenue and open pipeline. It also displays a second bar chart that shows your forecast by time periods. If you enable the Quota metric, then the landing page displays a quota vs. forecast chart instead of the forecast by period. Your third option is the forecast trend graph to be the second chart. If enabled, sales managers can add notes about their adjustments when they adjust forecasts. To enable adjustment notes and the forecast trend graph:

1. Select **Enable Forecast Trend Graph** to replace the period bar graph, or the quota chart if you use quotas, with the forecast trend graph.

   For the displayed territory, forecast period, and type of forecast, the graph shows the following:
   - Current and past forecast snapshots
   - Won revenue trend
   - Quota

2. Select **Enable Adjustment Notes** to enable notes for adjustments. Sales managers can then add adjustment notes for each forecast item. They can also create and edit a single adjustment note for summary territory adjustments or a note for summary product adjustments.

---

**Enabling Forecast Adjustments By Product Quantity**

If you enabled forecast adjustments by product in the Select Forecasting Options window, you can permit sales managers to adjust forecasts by editing the product quantity in addition to the revenue (quantity times price).

To enable the quantity adjustment, you edit the ORA_ZSF_SHOW_METRICS lookup type and enable the ORA_QUANTITY lookup code.

**Enabling Forecast Adjustment by Product Quantity**

1. Navigate to the Setup and Maintenance work area and search for the Manage Standard Lookups task.
2. Click the task name link in the search results.
3. Search for the lookup type **ORA_ZSF_SHOW_METRICS** or the meaning **Forecast metric options**.
4. Highlight the row containing this lookup type.
5. In the Lookup Codes region, find the lookup code `ORA_QUANTITY` and select Enabled.
6. Click Save and Close. Quantity is now enabled for selection in the Show list on the Edit Forecast page.

Generating Your Forecasts

After you submit forecasting options, you must schedule the following processes to run periodically.

- **Due Date Check**
  This short process archives forecasts that are now past their due dates and activates the next scheduled forecast. It should be run every night after midnight.

- **Refresh Forecast**
  This process updates current and future forecasts using the latest opportunity data. It also updates the forecast territory hierarchy from the latest active territories. Between the territory freeze date and the forecast due date, the forecast territory hierarchy remains frozen. Run this process once prior to the territory freeze date for each forecast period.

- **Refresh Forecast Items**
  Opportunities constantly change. This process quickly refreshes forecast items that may not be synchronized with the underlying opportunity data. It should be run every night after midnight.

- **Refresh Revenue Metrics**
  If you have enabled either the pipeline metric or the closed revenue metric, then you must schedule this process to run every 10 minutes. This process refreshes the pipeline metrics visible to the manager.

- **Compress Forecast Metrics**
  This process reduces space usage and improves performance by compressing pre-calculated metrics. You must schedule this process to run every 10 minutes.

⚠️ **Caution:** Do not run the Generate Forecast process.

Scheduling Forecasting Processes

Perform the following steps to schedule and run forecasting processes:

1. Sign in as a setup user or sales administrator.
2. In Setup and Maintenance, search for the Run Refresh Forecast Process task.
3. Click the task name link in the search results.
4. To run the process immediately, click **Submit**.
   If opportunities were bulk loaded into the database, it may take some time to refresh the forecast with the new data.

5. Schedule the Refresh Forecast process. The recommendation is to schedule the Refresh Forecast process to be run a day before the territory freeze date. Click **Advanced** in the Run Refresh Forecast Process page.

6. Select **Run Using a Schedule**.

7. For Frequency, select **Monthly**.

8. Select start and end dates and times.

9. Go to the Notification tab.

10. Click **Create Notification**.

11. Enter the e-mail address for the person who should receive notifications.

12. In the **Condition** field, you select **On Warning** and **On Error** as a minimum.
13. Find the Run Due Date Check Process task and click the task name link.
14. Repeat the steps to schedule this process to run after midnight each day. Create a notification for this process as well.
15. Click Submit.

See the Define Sales Forecasting chapter of the Oracle Sales Cloud Implementing Sales guide for information about other forecasting processes.

Timing for Forecast Processes

At the end of a scheduled forecast (the due date), you must give the processes time to run before the territory freeze date of the next forecast, which is the start of forecast activities. Running the process provides salespeople with accurate information for updating and submitting their forecasts.

Oracle recommends a one-day gap to run both the Refresh Forecast and the Due Date Check processes. The Refresh Forecast process must be scheduled to run the night before the freeze date. The Due Date Check process must be scheduled to run daily after midnight, for example, at 12:05 a.m.
22 Getting Started with Sales Prediction

About Sales Prediction

You can use Oracle Sales Cloud to predict future sales opportunity revenues, provide product recommendations, and generate leads based on historical sales data and rules you create. You can use rules to create product recommendations, generate leads, or both, even if your application does not yet contain the historical sales data required for data model analysis.

For example, if the US Department of Education provides tax incentives for the education industry that may benefit your sales, then you can create a rule to recommend a product for every education account. You can also use the rule to generate leads automatically. If you don’t use the rule, then you have to manually create a lead for every account.

The product recommendations are displayed under the Top Recommendations heading in the Products section of the Account Overview page. The following figure shows a partial screen capture of the page with sample data.

The sales prediction application creates the recommendations by evaluating the rule whenever a user views the account. If you change the prediction rule, then the recommendations are updated automatically. If you generate leads, the leads are automatically assigned for qualification based on the assignment process you have set up either using sales territories or assignment rules.
Setup Overview

Setting up a sales prediction rule and generating leads based on the rule recommendations requires two steps that you must perform while being signed in as a user with the Sales Analyst job role.

1. Create a rule to recommend a product for every education account in North America.
   
   See Setting Up Sales Prediction Rules in this chapter for details.

2. Generate leads based on recommendations from the Generate Leads process.
   
   See Generating Leads from Sales Prediction Rules in this chapter for details.

Related Topics

- Sales Prediction: Overview
- Working with Sales Prediction Features

Setting Up Sales Prediction Rules

Use the Configuring Prediction Rules procedure as a guide for setting up a rule to automatically generate leads based on different attributes of your accounts.

In this example, a sales analyst at Vision Corporation wants to generate a lead for every education account because the US Department of Education is providing new tax incentives for the industry.

Configuring Prediction Rules

Perform the following steps to configure a prediction rule:

1. Sign in as a sales analyst, and select Recommendations under the Sales heading in the Navigator.
   
   The Customer Asset Analysis page appears.

2. Click Manage Rules from the graphic panel.
   
   The Manage Rules page appears.

3. Click Create Recommendation.
   
   The Create Recommendation page appears.

4. Enter the required rule criteria, such as the Rule Name, and specify the Rule Folder. You also select the products and customers you want to target.

   Note: You must enter at least one product or product group for the rule and a percentage value for the propensity of customers whom you expect to purchase the green server product.
See the following figure that shows the Edit Recommendation screen.

5. Click **Save and Close**.

The Manage Rule page appears. Activating a rule automatically generates recommendations for each matching account. The recommendations appear on the Account Overview page.

You are now ready to generate leads that are based on the recommendations created for each matching customer.

**Related Topics**
- Generating Leads Using Models and Rules: Worked Example

## Generating Leads from Sales Prediction Rules

You can generate leads based on recommendations from the Generate Leads process. If you generate leads that are based on recommendations, then they're assigned automatically based on lead assignment rules you created previously.

Perform the following steps to generate leads from a sales prediction rule:

1. While signed in as a setup user or a sales analyst, select **Recommendations** under the **Sales** heading in the Navigator.

   The Recommendations page appears.

2. In the Tasks region, under the Leads section, click **Generate Leads**.
3. Click **Create**.
4. Complete the fields as required. The following table lists the fields and provides sample values to generate leads based on the sample prediction rule.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>Create Sales Leads for Education Industry</td>
</tr>
<tr>
<td><strong>Record Type</strong></td>
<td>Account</td>
</tr>
<tr>
<td><strong>Generated By</strong></td>
<td>Prediction Rules</td>
</tr>
<tr>
<td><strong>Production Rule Folders</strong></td>
<td>Fuse Demo Rules</td>
</tr>
<tr>
<td></td>
<td>If there are no Rule Folders available from the drop-down list, then click the Create list item to create your own rule folder.</td>
</tr>
<tr>
<td><strong>Maximum Number of Recommendations per Customer</strong></td>
<td>5</td>
</tr>
<tr>
<td><strong>Ranked By</strong></td>
<td>Likelihood to buy</td>
</tr>
<tr>
<td></td>
<td>Enter a percentage value for the propensity of customers whom you expect to purchase the green server product.</td>
</tr>
<tr>
<td><strong>Select Option</strong></td>
<td>By Profile</td>
</tr>
<tr>
<td><strong>Country</strong></td>
<td>United States</td>
</tr>
</tbody>
</table>

5. Click **Continue**.

The Create Predictor Lead Generation Process page appears.

6. Click **Advanced** and select to run **As soon as possible** option.

7. Click **Submit** and then click **OK** from the Confirmation dialog box.

   On the Generate Leads page, you will see the report icon in the **View Report** column after the leads preview process has completed successfully.

8. Click the report icon for your Lead Generation Process job.

9. Preview and select leads that you want to generate from the Preview Leads page.

   You can select multiple leads and save. When you’re ready with all your selections, you can generate leads.

10. Click **Generate Leads**.

    Depending how you have setup your lead assignment process, the leads are assigned to the appropriate salespersons for follow-up.

**Related Topics**

- Generating Leads Using Models and Rules: Worked Example
23 Integrating Google Gmail and Calendar

Integrating Google Gmail and Calendar Setup Overview

Integrating Google Gmail with Oracle Sales Cloud makes it possible for sales professionals to use Google Gmail and Calendar to manage their e-mail, contacts, and appointments from within Gmail and share data easily with Oracle Sales Cloud. Read the About Integrating Google Gmail and Calendar with Oracle Sales Cloud topic to get an idea how the integration works and then complete the setups outlined in the following table. You can open the Oracle Sales Cloud tasks from the implementation project. Installing the Oracle Sales Cloud for Gmail Chrome extension is done for each user separately.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
</table>
| 1    | To turn the integration on, you must set the two following system profile options to Yes:  
• Gmail Appointment Synchronization Enabled  
• Gmail Contact Synchronization Enabled | Manage Administrator Profile Values | See the Turning on Contact and Appointment Synchronization topic in this chapter. |
| 2    | Run the Synchronization Between Sales Cloud and Gmail process on a regular schedule to keep contacts and appointment information updated.  
By default, the application synchronizes all the contacts in the My Favorite Contacts list (all of the contacts that a user marks as favorite) and all the activities in the All Open Activities list (all the open appointments where the user is listed as a resource). Individual users can select different lists to synchronize by editing the settings in the Oracle Sales Cloud for Gmail Chrome extension. | Synchronization Between Sales Cloud and Gmail | See the Running the Contact and Activity Synchronization Process topic in this chapter. |
| 3    | Install the Oracle Sales Cloud for Gmail extension in Chrome using the URL provided in My Oracle Support document Oracle Sales Cloud for Gmail Chrome Extension (Doc ID 2188228.1). | You download and install the extension in the Chrome browser. | See the Installing the Oracle Sales Cloud for Gmail Extension topic in this chapter. |
About Integrating Google Gmail and Calendar with Oracle Sales Cloud

Using the Oracle Sales Cloud for Gmail extension, users can:

- Know when the sender and anyone copied on an e-mail are already contacts in Oracle Sales Cloud and get the latest information about those contacts
- Add new contacts to Oracle Sales Cloud and keep all contacts in Google Contacts synchronized
- Share all important e-mails to accounts, contacts, opportunities, and leads, so they are visible to everyone who needs to know from within Oracle Sales Cloud
- Synchronize Google calendar appointments with the different calendars in Oracle Sales Cloud ensuring that everyone in your organization is aware of how customer is being engaged and when

Architecture

The Oracle Sales Cloud for Gmail extension consists of two parts:

- A side panel that appears whenever users are editing an e-mail or a calendar appointment in Chrome. The side panel displays information about the relevant contacts from Oracle Sales Cloud and permits users to create contacts and share e-mails and appointments with Oracle Sales Cloud. Individual users must install the Oracle Sales Cloud for Gmail extension side panel themselves.

- A synchronization process that you run in Oracle Sales Cloud to keep contacts and calendar appointment synchronized.

The following figure shows how the two parts of the Oracle Sales Cloud for Gmail extension interact with Oracle Sales Cloud and Google Chrome.

- Changes users make in the side panel are reflected immediately in Oracle Sales Cloud. For example, when users share an e-mail or create a contact or an appointment in the side panel, Oracle Sales Cloud is updated immediately using web services.
- Changes to Google Contacts and Calendar must be synchronized by the process.

The synchronization process copies over to Google the latest contact and calendar information for the set of contacts and activities specified in a list (saved search) of contacts and activities in Oracle Sales Cloud.
How the Extension Works

The Oracle Sales Cloud for Gmail extension side panel appears whenever you open an e-mail or a calendar appointment in Chrome. The following figure shows a screen capture of what the side panel looks like for an e-mail. The side panel works very much the same way for appointments.

Callouts described in the following table highlight different features of the panel in the figure.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Feature Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Information about the e-mail sender (or appointment attendee) is displayed in the panel if the sender is a known contact.</td>
</tr>
<tr>
<td>2</td>
<td>The sender and the recipients (or attendees) are represented as tabs on the panel. If the sender or other recipients (or attendees) are contacts in Oracle Sales Cloud, the tab displays their initials. Clicking the tab with the initials displays the contact information from Sales Cloud.</td>
</tr>
<tr>
<td>3</td>
<td>If a recipient or attendee is not a contact, then the side panel displays a person icon on the tab instead of the initials. You can click the tab to create the contact.</td>
</tr>
<tr>
<td>4</td>
<td>Clicking Share, the envelope icon (calendar icon for appointments), shares the e-mail thread (or appointment) with individual accounts, contacts, opportunities, and leads. You can share e-mail attachments of up to 10 Megabytes in size.</td>
</tr>
</tbody>
</table>
To view the shared e-mails in Oracle Sales Cloud, you click the Activities tab, select as a Completed Activities, and look for activities of type E-mail. (While e-mails are all completed activities; calendar appointments are open activities until the appointment is over.)

The following figure shows a screen capture of the Activities tab on the Edit Account page. Similar tabs are available for contacts, opportunities, and leads. The table lists the callouts highlighting the different UI features.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Feature Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Activities tab icon</td>
</tr>
<tr>
<td>2</td>
<td>The Show list, which you can use to display open or completed activities.</td>
</tr>
<tr>
<td>3</td>
<td>The Activity type.</td>
</tr>
</tbody>
</table>
Users drill down to view the e-mail text and any attachment. The following figure shows a screen capture of a sample shared e-mail.

Contacts synchronized from Oracle Sales Cloud appear in Google Contacts as a separate list under My Contacts.

The following figure shows a screen capture of a sample Contacts page with the location of the list highlighted by a callout.
Turning On the Synchronization of Contacts and Calendar Appointments

You must set the Gmail Appointment Synchronization Enabled and Gmail Contact Synchronization Enabled system profile options to enable the synchronization of contacts and calendar appointments between Oracle Sales Cloud and Gmail.

To set the two system profile options, do the following:

1. Sign in as a setup user and open the Manage Administrator Profile Values task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.

   The Manage Administrator Profile Values page appears.

2. In the Search: Profile Option region, Profile Display Name field, enter %Gmail% to search for all of the Gmail profile options.

3. Click Search.

   The page displays the two profile options in the search results:
   - Gmail Appointment Synchronization Enabled
   - Gmail Contact Synchronization Enabled

4. Select each of the profile options and set their Profile Value to Yes.

5. Click Save and Close.
Running the Contact and Activity Synchronization Process

You must run the Synchronization Between Sales Cloud and Gmail process on a frequent schedule to ensure contacts and activities are synchronized. Individual users can specify which contacts and activities they want synchronized by selecting one of the lists (saved searches) available in the Contact and Activities work areas.

Running the Synchronization Process

To schedule the synchronization process:

1. While signed in as a setup user, open the Synchronization Between Sales Cloud and Gmail task from the implementation project. Alternatively, you can:
   a. Click the Navigator icon, and click Scheduled Processes under the Tools heading.
   c. On the Schedule New Process dialog box, select Job as the Type.
   d. Click the Name drop-down list and click Search.
   e. Search for Synchronization Between Sales Cloud and Gmail.
   f. Select Synchronization Between Sales Cloud and Gmail under the search results and click OK.
   g. On the Schedule New Process dialog box, click OK.

The Process Details window appears. The following figure shows a screen capture of the window.

2. Click the Advanced button.
3. On the Schedule tab, select Using a Schedule.
4. Select the frequency in which you want the process to run.

Set the synchronization frequency to an interval no shorter than five minutes to ensure that all records are processed. If the data volume is low (fewer than 200 records updated in Oracle Sales Cloud and Gmail together), then set the frequency to five minutes. If the data volume is high (more than 1000 records updated in Oracle Sales Cloud and Gmail together), then set a frequency of 30 minutes.

5. Select the start and end dates.
6. Click Submit.

The job is now scheduled and synchronization takes place based on the frequency that you selected.
Specifying which Records to Synchronize

By default, the application synchronizes all the contacts in the My Favorite Contacts list (all of the contacts that a user marks as favorite) and all the activities in the All Open Activities list (all the open appointments where the user is listed as a resource).

Optionally, individual users can select different lists (saved searches) to synchronize. You select a different list as follows:

1. In the Oracle Sales Cloud for Gmail extension side panel, click **Settings**.
2. Click **Connection Settings** and select either **Activity synchronized settings** or **Contact synchronized settings** from the list.

This table list the callouts on the side panel screen capture which follows.

<table>
<thead>
<tr>
<th>Callout</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Settings</td>
</tr>
<tr>
<td>2</td>
<td>Connection Settings</td>
</tr>
</tbody>
</table>

The following figure shows a screen capture of the side panel showing connection settings.

3. Click below the Saves Search heading to view the available lists and select a list.
Oracle provides the following alternate lists of contacts to choose from. There are no alternate preconfigured lists available for activities.

<table>
<thead>
<tr>
<th>Saved Search</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Contacts</td>
<td>All contacts in Oracle Sales Cloud.</td>
</tr>
<tr>
<td>My Business Contacts</td>
<td>All contacts belonging to all the accounts you own.</td>
</tr>
<tr>
<td>My Contacts</td>
<td>All contacts that you own.</td>
</tr>
</tbody>
</table>

Individual users can create their own lists or administrators can create lists for the whole organization. See the Customizing Work Area Lists topic in the Oracle Sales Cloud Customizing Sales guide for details.

## Installing the Oracle Sales Cloud for Gmail Extension

Use the following procedure to install the Oracle Sales Cloud for Gmail Chrome extension from the Chrome web store and connect to Oracle Sales Cloud.
Installing the Extension

Use these steps to install the extension. You must use the link provided on My Oracle Support to install the extension. You cannot search for the extension by name in the web store.

2. Search for document Oracle Sales Cloud for Gmail Chrome Extension (Doc ID 2188228.1).
3. Click the link in the Details section.

The Oracle Sales Cloud for Gmail window opens in the Chrome web store.

4. Click **ADD TO CHROME**.
5. Click **Allow** when prompted to allow access to e-mails, calendars, and contacts.

The Oracle Sales Cloud for Gmail extension appears as a side panel when you open an e-mail or a Calendar appointment.

Note: If you installed the extension after signing in to your Gmail, you must refresh the page for the Oracle Sales Cloud for Gmail side panel to appear.

Connecting the Extension to Oracle Sales Cloud

Use the following steps to connect the extension to Oracle Sales Cloud.

1. Sign in to Gmail and open an e-mail or an appointment in the calendar.
2. Click the **Settings** icon on the side panel (highlighted by callout 1 in the following figure).

![Settings Icon](image)

3. In the Connection Settings section, enter:
   - Host name.
   - The host name is the portion of the Oracle Sales Cloud URL starting with `https://` and ending before `/sales`. For example, in the URL `https://vision.com/sales/faces/FuseOverview`, the host is `https://vision.com`. To obtain the host name, sign in to Oracle Sales Cloud and navigate to any of the sales work areas.
   - The Oracle Sales Cloud user name.
   - The password associated with the user name.

4. Click **Sign in**.

**Note:** You can only associate each Oracle Sales Cloud user with one Gmail e-mail address. After you connect for the first time, you must retain the same Gmail address for the user.
Setting Up Microsoft Outlook

Overview of Oracle Sales Cloud for Outlook

The Oracle Sales Cloud for Outlook application helps maximize sales productivity by providing Oracle Sales Cloud capabilities directly within Microsoft Outlook, thereby allowing sales professionals access to essential Sales Cloud data.

Summary of Features

The following table lists the key features of Oracle Sales Cloud for Outlook.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Cloud capabilities within Microsoft Outlook</td>
<td>Using Oracle Sales Cloud for Outlook, all emails, calendar events, and tasks can be linked to the respective contact, customer, lead, or opportunity within Oracle Sales Cloud. Sales professionals can access and update customer and sales information within Microsoft Outlook.</td>
</tr>
<tr>
<td>Single-click sharing between Microsoft Outlook and Oracle Sales Cloud</td>
<td>When sending a meeting invite or an email, or when setting up a task, a single click on the Share with Oracle Sales Cloud button captures the action and updates of Oracle Sales Cloud in the background.</td>
</tr>
<tr>
<td>Synchronization of data between Oracle Sales Cloud and Microsoft Outlook</td>
<td>Two-way data synchronization allows sales professionals to have a continuously updated and accurate 360-degree view of Sales Cloud data changes.</td>
</tr>
<tr>
<td>Synchronization Control Panel</td>
<td>Oracle Sales Cloud for Outlook provides synchronization filtering capabilities, enabling sales professionals to synchronize only the most critical data from Oracle Sales Cloud. Sales professionals can synchronize high-priority accounts or opportunities closing this quarter, instead of synchronizing the entire data set from Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Offline access</td>
<td>The transition between online and offline modes of operation allows sales professionals in the field to use the full functionality of the product in an offline mode, and then synchronize the sales data in the next synchronization cycle.</td>
</tr>
<tr>
<td>User-defined configuration for Oracle Sales Cloud for Outlook:</td>
<td>Add to the standard Microsoft Outlook view, or rearrange how the page looks, using Oracle Sales Cloud for Outlook’s user-defined objects, fields, and User Interface layout options. For example, user-defined objects or objects that you rely on can be added to the application to cater to specific organizational or user requirements.</td>
</tr>
</tbody>
</table>

Related Topics

- Implement Oracle Sales Cloud for Outlook: Explained
Overview of Oracle Sales Cloud for Outlook Installation

This topic provides an overview of how to install Oracle Sales Cloud for Outlook manually on each laptop or PC along with the prerequisite steps.

Before installing Oracle Sales Cloud for Outlook, ensure the following:

- Microsoft Outlook is installed on the laptop or PC.
- An existing Microsoft Outlook profile is available for use with Oracle Sales Cloud for Outlook, or a new Microsoft Outlook profile has been created.
- The user performing the installation is a sales application user provisioned with either the Sales Representative or the Sales Manager job role, but not both.
- All the system requirements are met. See the System Requirements page for details.

The installation steps include downloading the installer file, running the InstallShield Wizard, and entering the Oracle Sales Cloud Connection information if it’s not already set up.

Installing the Oracle Sales Cloud for Outlook Application

This topic explains the prerequisites and steps to install the Oracle Sales Cloud for Outlook application on a laptop or PC.

Downloading Oracle Sales Cloud for Outlook Installer File

To download the Oracle Sales Cloud for Outlook installer file:

1. Sign in as either a sales manager or a sales representative, and select the Personalization menu, and then select the Set Preferences menu item.
2. Select CRM for Microsoft Outlook Installer under the Preferences pane.
3. Click Start Download to download the installer for either the 32 Bit or 64 Bit option, based on your Microsoft Outlook configuration.

Running the InstallShield Wizard

To run the InstallShield wizard:

1. Navigate to the downloaded installer file, unzip the file, and double-click the .msi file to start the installation.
2. On the Welcome page of the InstallShield Wizard, click Next.
3. On the Destination Folder page, check the default folder that will be created in the installation. If you want to use a different folder, then click Change.
4. When you have confirmed or selected a folder on the Destination Folder page, click Next.
5. On the Ready to Install the Program page, click Install.
Entering the Oracle Sales Cloud Server Connection Information

To enter the connection information:

1. After the InstallShield wizard completes, open Microsoft Outlook.
2. On the Choose Profile page, choose the Microsoft Outlook profile that you want to use with Oracle Sales Cloud for Outlook, then click OK.
3. On the message asking if you want to install the application using the profile you selected in step 2, click Yes.
4. When the Oracle Sales Cloud for Outlook First Run Assistant pane appears, click anywhere in the Assistant pane to display the Login page.
5. In the Login page, enter your user information and the Oracle Sales Cloud server information.

   The server information may be set up by default based on your administrator settings.

6. Click Login to complete the installation.
7. Once the configuration is complete, set the synchronization filters and start the synchronization.

For more details on installing and administering Oracle Sales Cloud for Outlook, see the Deploying Oracle Sales Cloud for Outlook guide on docs.oracle.com.

Related Topics

- System Requirements for Oracle Applications Cloud
About Setting Up Mobile Applications

Oracle Applications Cloud offers the following mobile applications that integrate with Oracle Sales Cloud: Oracle CX Cloud Mobile, Oracle Sales Cloud Mobile, and Oracle Mobilytics. This chapter outlines the capabilities of these applications, and provides installation and setup information.

Oracle CX Cloud Mobile

Oracle CX Cloud Mobile: Overview

The Oracle CX Cloud Mobile (CX Cloud Mobile) application enables field sales representatives, channel account managers, and partner representatives to manage their day effectively and develop customer relationships using a smartphone. With a task-based user interface and built-in analytics, the CX Cloud Mobile application guides daily sales activities and enables the following activities for sales representatives:

- View appointments.
- View aggregated activities in a visual time line for every customer.
- Log call reports and meeting minutes.
- Create ad hoc call reports and add ad hoc activities.
- Automatically capture outbound calls or e-mails as an activity associated with a customer.
- Accept, qualify and convert leads by age.
- Manage opportunities and product lines.
- Update and collaborate using Oracle Social Network.
- Use simple voice commands to navigate and to search for sales records.
- Attach photos and documents to a record.
- Locate and get directions to nearby opportunities, leads, deal registrations, contacts, partners, and accounts.
- View service request status and updates.
- Review quota attainment, open pipeline, and sales commission reports.
- View sales information while offline.

Furthermore, channel account managers and partner sales representatives can also do the following tasks:

- Submit and approve deal registrations.
- Manage partners and partner contacts.
Installing the iPhone Application: Procedure

This procedure shows you how to install the Oracle CX Cloud Mobile application on your iPhone.

1. Open the App Store, search for Oracle CX Cloud Mobile application, and then tap **Install**.
2. Open the application. If you have received an application URL from your administrator, you can tap on the URL link to open the application. Alternatively you can scan the QR code to launch the application.
3. Accept the Legal Terms.
4. If you have opened the application using the application URL or the QR code, the host name, port number, and SSL details will be populated automatically.
   If you opened the application after downloading it from the App Store, you will need to enter the host name your administrator has provided (or refer to the Finding Your Company's Host URL: Worked Example topic).
5. Enter your Oracle Sales Cloud user name and password. You can tap **Save Password** to save this password.
6. Tap **Sign In**.

Installing the Android Application: Procedure

This procedure shows you how to install the Oracle CX Cloud Mobile application on your Android device.

1. Open Google Play on your Android device.
2. Search for the Oracle CX Cloud Mobile application and tap **Install**.
3. Open the application. If you have got the application URL from your administrator, you can tap on the URL link to open the application. Alternatively you can scan the QR code to launch the application.
4. Accept the Legal Terms.
5. If you have launched the application using the application URL, or the QR code, the host name will be populated automatically.
   If you have opened the application after downloading it from Google Play you will need to enter the host name provided by your administrator (or refer to the Finding Your Company’s Host URL: Worked Example topic). Tap **Settings** to enter the host name.
6. Enter your Oracle Sales Cloud user name and password. You can tap **Save Password** to save this password.

Implementing Oracle CX Cloud Mobile: Overview

Here is a summary of the steps required to roll out Oracle CX Cloud Mobile (CX Mobile) at your organization:

1. If you are modifying CX Mobile for your organization’s particular requirements, you need to set the `ZMS_DISABLE_OSCM` profile option to **ENABLED**. Setting the profile option will enable the new mobile interface designer in Application Composer. For more details about navigating to profile options, see the topic that explains how to access predefined profile options.
2. To modify CX Mobile using the new mobile interface designer first enable a sandbox, then navigate to Application Composer, select the Sales application, and click **Mobile Application Setup**. Using the mobile interface designer you can configure the application pages, such as moving objects and fields that you want to make visible onto the on-screen smartphone, create your own page layouts, and define which roles can view your page layouts. For more details about modifying CX Mobile, see the topic called Modifying Oracle CX Cloud Mobile: Explained.
3. You can add Oracle Business Intelligence reports to CX Mobile, so that your sales team can view the reports directly in the application. See the topic called Adding Oracle Business Intelligence Reports to a Sales Object’s Analytics Sub Tab: Procedure for more details.
4. You can enable Oracle Social Network (OSN) so that your users can share Oracle Sales Cloud object records to OSN. See the topic called How can I set up Oracle Social Network for Oracle CX Cloud Mobile for more details.
5. You can also enable the voice feature by setting the ZMS_MOBILEVOICE Profile Option value to ENABLED.
6. It’s recommended that you create a URL that automatically populates the host, port number, and SSO and SSL settings for your users. When users access the URL, CX Mobile will open with the applicable settings already populated. For details about how to create the URL, see the topic called How can I automatically populate the host, port number, and SSO and SSL setting for Oracle CX Cloud Mobile users?
7. Distribute the installation instructions and the URL you created in step 5 to your users. You can use the installation instructions outlined in the following topics: Installing the Oracle CX Cloud Mobile iPhone Application: Procedure and Installing the Oracle CX Cloud Android Application: Procedure.

Related Topics
- How can I access predefined profile options?
- Adding Oracle Business Intelligence Reports to a Sales Object's Analytics Tab: Procedure
- How can I set up Oracle Social Network for Oracle CX Cloud Mobile?

Finding Your Company's Host URL: Worked Example

This topic shows how to determine the host URL value for iPhone and Android devices. When signing in to the Oracle CX Cloud Mobile (CX Cloud Mobile) application, users must enter a Host URL that specifies the Oracle Sales Cloud server location. The URL can be entered manually by the user, or you can create a URL that will automatically populate the host name, port number, and enable SSL (refer to the How can I automatically populate the host and port information for CX Cloud Mobile users topic for more details).

Determining the Host URL for iPhone and Android Devices

1. Sign in to Oracle Sales Cloud and select Navigator and then Application Composer.
2. Copy the host name portion of the URL that’s in your browser's address bar. The host name is the part between https:// and the next slash (/). For example, the host URL might be something like: fapxxxx-crm.oracleads.com.
3. If users are entering the Host URL manually, then inform your users of the Host URL value so that they can use it when they sign into the application.

How can I automatically populate the host, port number, SSO and SSL setting for users?

Create a URL to distribute to your users, as follows:

1. To automatically populate the host URL, create the following URL: oscm://?host=<host value>. For example, oscm://?host=uscdrmovm44-crm-ext.us.oracle.com
2. To automatically populate the host URL and SSO setting, create the following URL: oscm://?host=<host value>&useSSO=<true/false>. For example, oscm://?host=uscdrmovm44-crm-ext.us.oracle.com&useSSO=true
3. To automatically populate the host URL, port number, and SSL setting in the Advanced Settings, create the following URL: oscm://?host=<host value>&port=<port value>&useSSL=<true/false>. For example: oscm://?host=uscdrmovm44-crm-ext.us.oracle.com&port=10616&useSSL=true

Distribute the formatted URL to your users, using e-mail or some other suitable communication method. When users access the URL, Oracle CX Cloud Mobile will open with the applicable settings already populated.
Configuring Oracle CX Cloud Mobile: Explained

You can configure the Oracle CX Cloud Mobile iPhone and Android applications using Application Composer. Using Application Composer, you can manage which objects and fields are visible on the Oracle CX Cloud Mobile application without having to carry out specific configurations for a particular device.

Creating a Page Layout for a Feature

You can create a List, Detail, or Edit page layout for a Oracle CX Cloud Mobile feature. Creating your own layout enables you to select the fields your users will see for a feature’s views. See the Creating a Page Layout for a Feature: Procedure topic for details about how to create a page layout.

When you create a page layout, you can add, remove, move, and change a field’s display format using the mobile interface designer. Find out more information about using the mobile interface designer in the following FAQs:

- How can I add a field to a feature’s page layout?
- How can I delete a field in a feature’s page layout?
- How can I move a field in a feature’s page layout?
- How can I edit a field’s display format in a feature’s page layout?
- How can I hide or display user actions for a feature?

Adding a Role to a Page Layout

You can add a role to an application feature’s List, Detail or Edit layout. For example, a user with the Sales Manager role might want to see certain fields on an opportunity detail record that other sales team members won’t need. See the Adding a Role to a Layout: Worked Example topic for details about adding a role.

Creating Criteria for a Page Layout

You can create criteria to define a set of conditions that have to be met before the page layout is displayed for a feature’s Detail or Edit views. See the Creating Criteria for a Feature Page Layout: Procedure for step by step instructions.

Adding Your Own Object to a Page Layout

You can add your own objects to your CX Cloud Mobile application, and add page layouts in the same way that you can with standard sales objects (or features, as they are known as in the Mobile Application Setup). See the Adding Your Own Object to a Page Layout: Procedure topic for more details.

Assigning Geographical Regions to a Page Layout

You can assign geographical regions to a page layout, which will restrict a page layout’s availability to users from your selected set of geographical regions.

Testing Configurations

After you have configured Oracle CX Cloud Mobile using Application Composer, you should test your configurations before distributing them to your user’s mobile devices. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for more details.

Related Topics
- Creating a Page Layout for a Feature: Procedure
Oracle Sales Cloud Mobile

Oracle Sales Cloud Mobile: Overview

Use the Oracle Sales Cloud Mobile application to do the following tasks:

- Track and update sales information on your smartphone or tablet
- Keep up to date with sales activities in your enterprise while on the move

Tasks That You Can Do

The key features of Oracle Sales Cloud Mobile include the following:

- Application Home Page: From the application home page, you can access critical information when you’re in the field.
- Sales Account Management: You can access reference information, as well as current events about the customer while on the road.
- Opportunity Management: From the mobile opportunity management page, you can access current and critical information about your opportunities and share opportunity updates with your sales team.
- Lead Management: With access to open leads while on the road, you can act upon leads and reduce the sales cycle time.
- Calendar and Tasks: With these features, you can manage appointments and tasks on the road.
- Contacts: You can call or e-mail contacts from the Actions menu. The application displays a list of your key contacts by default, and you can search for all other contacts. E-mail Contact and Call Contact features are disabled for contacts who don’t want to be phoned or e-mailed
- Sales Analytics: You can access business intelligence reports from the home page. Analytics also are embedded contextually for each account that you view. The contextual reports include data on sales account revenue trends, sales account win/loss trends, and sales account win/loss reasons.
- Alerts: You receive alerts when new leads are assigned or opportunities of interest become available.

Prerequisites

Before implementing Sales Cloud Mobile, you must:

- You must set up Oracle Sales Cloud before you can use Sales Mobile.
- Determine if your mobile device meets Sales Mobile system requirements. See the System Requirements for Oracle Applications Cloud here: http://www.oracle.com/us/products/system-requirements/overview/index.html
Related Topics

- How can I navigate within the Oracle Sales Cloud Mobile client?

Finding Your Company's Host URL for Oracle Sales Cloud Mobile: Worked Example

This topic shows how to determine the host URL value for iPhone and Android devices. When signing in to Oracle Sales Cloud Mobile, you must enter a **Host** URL that specifies the Oracle Sales Cloud server location.

**Determining the Host URL for iPhone and Android Devices**

Perform these steps to determine the Host URL for iPhone and Android devices.

1. Sign in to Oracle Sales Cloud, and select **Navigator** and then **Application Composer**.
2. Copy the host name portion of the URL that's in your browser's address bar. The host name is the part between https:// and the next slash (/). For example, the host URL might be something like: fapxxxx-crm.oracleads.com.
3. Inform your users of the Host URL value so that they can use it when they sign in to the application.

Installing the Oracle Sales Cloud Mobile iPhone Application: Procedure

This procedure shows you how to install Oracle Sales Cloud Mobile on your iPhone.

1. Use your iPhone to sign in to iTunes and access the App Store.
2. Search for **Oracle Sales Cloud Mobile** and then tap **Install**.
3. Enter the host URL that your administrator has provided.
4. Enter your user name and password.
5. Sign in to the Oracle Sales Cloud Mobile application.

Installing the Oracle Sales Cloud Mobile Android Application: Worked Example

This example shows you how to install the Oracle Sales Cloud Mobile application on an Android device.

1. Use your Android device to sign in to Google Play, then browse the Apps.
2. Search for **Oracle Sales Cloud Mobile** and then tap **Install**.
3. Enter the host details that your administrator provided.
4. Open the Oracle Sales Cloud Mobile application, and enter your user name and password.
5. Sign in to the Oracle Sales Cloud Mobile application.
Installing the Oracle Sales Cloud Mobile BlackBerry Application: Worked Example

This topic shows you how to install the Oracle Sales Cloud Mobile application on a BlackBerry device.

1. Check that the BlackBerry’s Wi-Fi is switched on.
2. Obtain the host URL from your administrator, then enter the host URL in the BlackBerry browser.
3. Enter the authentication credentials to sign in.
4. Click **Start Download** to start the download and installation.

Configuring Your Mobile Springboard

You can add or remove object icons from the Sales Cloud Mobile application as follows:

1. Within Application Composer, choose **Sales** from the Applications menu.
2. Open the **Mobile Application Setup** page, either by clicking the page link under the Common Setup list, or by clicking the page link in the Overview section of the Application Composer page.
3. Click **Configure Springboard**.
4. Select the object you want to add or remove, and click the arrows pointing toward the right or left, moving the object to the **Available** list, or **Selected** list.
5. Click **Save and Close**.

Enabling Automatic Password Save on Mobile Devices

You can enable or disable automatic password saving on smartphones and tablets as follows:

1. Navigate to the Setup and Maintenance work area.
2. Search for the Manage Administrator Profile Values task.
3. Click the task name link in the search results.
4. In the Profile Display Name field, enter Password Save on Phone Enabled, then click **Search**.
5. In the Profile Values region, select the Mobile Sales line, and enter either **Y** (to enable) or **N** (to disable) password saving.

> **Note:** If you sign out of the application the password will need to be re-entered again.

How can I automatically populate the host and port information for Oracle Sales Cloud Mobile users?

You can create a URL that will automatically populate the host name, port number, and enable SSL, by using the following URL template: `osc://?host=[host name]&port=[port number]&useSSL=[true or false]`. After `host=`, enter the host name, after `port=` enter the port number, and after `useSSL=` enter whether you want SSL enabled. Here is an example of a URL: `osc://?host=abc.us.oracle.com&port=123&useSSL=false`.
Distribute the URL to your users. When users access the URL from their smartphone, the Sales Cloud Mobile application will open with the host name, port number, and SSL already populated or enabled.

**Note:** Oracle Sales Cloud Mobile needs to have been downloaded onto the smartphone for the URL to work.

**Oracle Mobilytics**

**Oracle Sales Cloud Mobilytics: Overview**

Oracle Sales Cloud Mobilytics is an iPad application used to provide sales leaders intelligence into sales performance. Mobilytics enables you to better manage your pipeline and team, and helps you to:

- Shape your quarterly forecasts more intelligently
- Focus on key deals and accounts
- Collaborate with team members using Oracle Social Network and e-mail
- Manage your team’s interactions with opportunities to improve pipeline conversion rates
- Access your team’s performance to better manage their potential and productivity

**Setting up Oracle Sales Cloud Mobilytics: Explained**

This topic describes the prerequisites and procedure for installing Oracle Sales Cloud Mobilytics.

**Prerequisites**

To use Mobilytics, you must:

- Have Oracle Sales Cloud implemented.
- Have the appropriate role:
  - Users with the Sales Rep role can view their own data.
  - Users with the Sales VP or Sales Manager job role can utilize the full capabilities of Mobilytics
- Set up your sales organization and quota to use Team Tracker
  - Define and allocate your quota by quarter
- Enable the forecast criteria override rule if your company does not use the forecast module. Use the Select Forecasting Options task in Setup and Maintenance
- Have the Oracle Cloud Calendar set up (see related links for more details).

**Installing Mobilytics**

To install the app, follow this procedure:

1. Download Oracle Mobilytics from the Apple Store.
2. Install the app.
3. When prompted, enter your host name. To determine your host name:
   a. Sign in to Oracle Sales Cloud and go to the welcome page.
   b. Click the arrow next to your sign in name and select Applications Help.
   c. Copy the portion of the link up to helpPortal, for example
      : https://company-website.com/helpPortal/
   d. Add /mobilytics to the URL, for example
      : https://company-website.com/helpPortal/mobilytics

Related Topics
- About Setting Up the Accounting Calendar in Oracle Sales Cloud

Configuring Oracle Sales Cloud Mobilytics: Explained

You can configure many of the Oracle Sales Cloud Mobilytics metrics using profile option values. Users with the Sales Administrator role should follow this procedure to configure profile option values:

1. From the Navigator, choose Setup and Maintenance.
2. Search for Manage Administrator Profile Values.
3. In the Module field, select Mobilytics.
4. Click Search
5. In the Search Results area, select the Profile Option you want to change.
6. Enter the desired value in the Profile Values area

The following table shows the available profile options and default values.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Fetch Year</td>
<td>Data pulled into the application is based on the Sales Cloud fiscal year. You can specify how many years worth of data to bring in.</td>
<td>2014</td>
</tr>
<tr>
<td>Deal Size</td>
<td>The default values are based on opportunity revenue amount.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Between $0 and $500,000 = Small</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Between $500,001 and $999,999 = Medium</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Greater than 1 million = Large</td>
<td></td>
</tr>
<tr>
<td>Deal Radar Activity Level</td>
<td>Level and placement in the Deal Radar visualization is determined by the number of interactions in the last 30 days.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• If the number of activities is less than 4 the level is considered Low</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Between 4 and 8 the level is Medium</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Greater than 8 then the level is considered High</td>
<td></td>
</tr>
<tr>
<td>Deal Radar Time - Months</td>
<td>This alternative view filter displays three months of data.</td>
<td>The inner circle displays the current month; the middle circle displays next month; the outer circle displays three months from the current date. You can override the number of months to display in each circle.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
<td>Default Value</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Team Tracker Nine Card Performance | Tenure and Attainment Percent can be overridden. | The X Axis is based on Tenure: (from left to right)  
• First box = Less than a year  
• Middle box = Between a year and two years  
• Third box = More than 2 years  
Y Axis is based on Attainment: (bottom to top)  
• First box = Less than 70% attainment  
• Middle box = Between 70% and 100% attainment  
• Third box = More than 100% attainment for the current fiscal years won opportunities |
Glossary

abstract role
A description of a person’s function in the enterprise that is unrelated to the person’s job (position), such as employee, contingent worker, or line manager.

dimension
A data category used to define territory boundaries, such as geography. Dimensions contain related dimension members usually organized in hierarchies. For example, a geography dimension often includes members, such as countries, and cities that belong to countries. Defined dimensions determine how to assign objects, such as customers, leads, and opportunities.

global area
The region at the very top of the user interface that remains the same no matter which page you’re on.

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

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

LDAP

resource role
Resource roles indicate the role a resource plays as an individual, or within a resource team.

setup user
A user provisioned with the job roles and abstract roles required to perform implementation tasks.

springboard
The grid of icons on the home page or the strip of icons above all simplified pages. Use the icons to open pages.

territory
The jurisdiction of responsibility of a salesperson or sales manager over a set of customers. Territories serve as a basis for forecasting, quota, compensation, and analysis of sales performance.
**territory coverage**
A territory coverage is a set of boundaries that define what is included or excluded in the territory and what can be sold. Selected customers or partners can be selected to be included or excluded from the territory being defined. For example, sell all products in North America.

**territory freeze date**
The date after which forecasting stops accepting territory hierarchy changes for the scheduled forecast and forecasting activities can begin.

**territory owner**
Resource assigned to manage a territory and is typically accountable for the work objects, such as opportunities, that are within the boundaries of the territory.