Contents

Preface

1 About This Guide
   Audience and Scope
   Related Guides

2 Getting Started
   Using Oracle Sales Cloud: Overview
   Proxies: Explained
   How can I perform tasks on behalf of another user?

3 Using Search
   Searching Oracle Sales Cloud: Explained
   Tips for Using Global Search in Oracle Sales Cloud
   Tips for Searching in Oracle Sales Cloud
   Searching for Objects in Their Work Areas: Explained
   What’s the difference between the global search and the work area searches in Oracle Sales Cloud?
   Creating Your Own Personal List
   Creating a New List in a Work Area: Worked Example
   Deleting or Hiding a List: Procedures
   How can I create saved searches with just one custom field?

4 Managing Activities and Calendar
   Activities: Explained
   Activity Notification: Explained
   Call Reports: Explained
   My Calendars: Explained
   Setting Up Appointment Visibility: Worked Example
   Creating Tasks from a Task Template: Procedure
   FAQs for Managing Activities and Calendar
# 5 Maintaining Account, Contact, and Household Information

Sales Accounts, Contacts, and Households: Explained  
Managing Accounts Information  
Managing Contacts Information  
Managing Households Information  
Accounts, Contacts, and Households Searches  
Merging Information  
Enriching Accounts and Contacts  
Managing Assets  
Duplicate Accounts and Contacts: Overview  
Managing Account, Contact, and Household Contracts: Explained  
Deleting Accounts, Contacts, or Households

# 6 Creating Sales Campaigns

Sales Campaigns: Overview  
Creating a Sales Campaign  
Adding Contacts to Sales Campaigns  
Inserting Response Forms to Sales Campaigns  
Adding Follow-up Tasks to Sales Campaigns  
Sales Campaign Content: Explained  
Adding Personalized Text in an E-Mail Campaign: Example  
Follow-Up Actions: How They Work  
FAQs for Creating Sales Campaigns
7 Managing Leads

Lead Management: Overview
How Lead Components Fit Together
Differences Between Response, Lead, and Opportunity: Explained
Lead Actions: Explained
Lead Statuses: Explained
Creating Leads with New Contact and Account: Procedure
Converting Leads with New Contact and Account: Procedure
Lead Qualification: Explained
Performing a Lead Qualification: Procedure
Performing Multiple Lead Qualifications: Explained
Applying Mass Update to Leads
Qualifying Leads: Examples
Lead Ownership and Sales Team Resources: Explained
Sales Lead Team Examples
FAQs for Managing Leads

8 Managing Opportunities

Opportunities: Overview
Working with Opportunities
Using Sales Coach
Managing Sales Competitors
Assigning Opportunities
Closing Opportunities
Performing Assessments
Understanding Integrations with Other Applications

9 Managing Opportunity Products and Revenue

Opportunity Products and Revenue: Overview
Working with Opportunity Products
Managing Recurring Products
Managing Sales Credits
Understanding Product Attribute Synchronization
10 Managing Partner Relationships 125

Partner Relationship Management: Overview 125
Managing Partners 127
Using Deal Registration 132
Managing Marketing Development Funds (MDF) 138
Managing Partner Contacts 143
Managing Partner Programs 145
Managing Partner Program Enrollments 151
Managing Partner Leads 152
Managing Partner Opportunities 154
Managing Service Requests 155
Using the Partner Portal 157
Managing Partner Collaboration 161

11 Using Computer Telephony Integration 163

Computer Telephony Integration: Overview 163
Managing Multiple Interactions: Explained 163
Managing Chats: Explained 164
FAQs for Computer Telephony Integration 165

12 Managing Forecasts 167

Sales Forecasting Features: Overview 167
Adding Opportunity Items to Your Forecast 168
About Forecasting by Territory, Product, or Unit 168
Managing Your Forecast 169
Sales Forecast Adjustments: Explained 169
Copying the Prior Forecast: Explained 170
Forecasting Actions and Consequences: Explained 170
Forecasting: Available Metrics 172
FAQs for Managing Forecasts 173
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Using Sales Prediction</strong></td>
<td>175</td>
</tr>
<tr>
<td>Sales Prediction: Overview</td>
<td>175</td>
</tr>
<tr>
<td>Understanding Buying Patterns of Your Customer: Overview</td>
<td>175</td>
</tr>
<tr>
<td>Sales Prediction Rules: Explained</td>
<td>176</td>
</tr>
<tr>
<td>Reviewing and Modifying Prediction Rules: Explained</td>
<td>176</td>
</tr>
<tr>
<td>Selecting Products for Recommendations: Points to Consider</td>
<td>177</td>
</tr>
<tr>
<td>White Space Analysis</td>
<td>178</td>
</tr>
<tr>
<td><strong>Using Territories</strong></td>
<td>183</td>
</tr>
<tr>
<td>Using Territories: Overview</td>
<td>183</td>
</tr>
<tr>
<td>Using Simplified Territory Management</td>
<td>183</td>
</tr>
<tr>
<td>Changing Territories</td>
<td>183</td>
</tr>
<tr>
<td><strong>Using Analytics</strong></td>
<td>189</td>
</tr>
<tr>
<td>Overview</td>
<td>189</td>
</tr>
<tr>
<td>Analyses for Sales Representatives</td>
<td>191</td>
</tr>
<tr>
<td>Analyses for Sales Managers</td>
<td>193</td>
</tr>
<tr>
<td>Analyses for Channel Account Managers</td>
<td>195</td>
</tr>
<tr>
<td>Analyses For Executives</td>
<td>198</td>
</tr>
<tr>
<td><strong>Using Industry Solutions</strong></td>
<td>203</td>
</tr>
<tr>
<td>Using Industry Solutions: Overview</td>
<td>203</td>
</tr>
<tr>
<td>Consumer Goods: Overview</td>
<td>203</td>
</tr>
<tr>
<td>Financial Services: Overview</td>
<td>204</td>
</tr>
<tr>
<td>High Tech and Manufacturing: Overview</td>
<td>205</td>
</tr>
<tr>
<td>Communications: Overview</td>
<td>206</td>
</tr>
<tr>
<td>Higher Education: Overview</td>
<td>207</td>
</tr>
<tr>
<td><strong>Using Microsoft Outlook</strong></td>
<td>211</td>
</tr>
<tr>
<td>Overview of Oracle Sales Cloud for Outlook</td>
<td>211</td>
</tr>
<tr>
<td>Overview of Oracle Sales Cloud for Outlook Installation</td>
<td>211</td>
</tr>
<tr>
<td>Installing the Oracle Sales Cloud for Outlook Application</td>
<td>212</td>
</tr>
<tr>
<td>Why can’t I view complete customer details for some customers associated with a contact, even though the customers are part of my sales territory?</td>
<td>213</td>
</tr>
<tr>
<td>How can I stop appointments, contacts, and tasks from being shared automatically with Outlook?</td>
<td>213</td>
</tr>
<tr>
<td>Section</td>
<td>Title</td>
</tr>
<tr>
<td>---------</td>
<td>-------</td>
</tr>
<tr>
<td>18</td>
<td>Using IBM Notes</td>
</tr>
<tr>
<td></td>
<td>Overview of Oracle Sales Cloud for IBM Notes</td>
</tr>
<tr>
<td>19</td>
<td>Using Gmail</td>
</tr>
<tr>
<td></td>
<td>Overview of Oracle Sales Cloud for Gmail</td>
</tr>
<tr>
<td></td>
<td>Installing and Configuring Oracle Sales Cloud for Gmail: Explained</td>
</tr>
<tr>
<td></td>
<td>Creating Contacts From the Oracle Sales Cloud for Gmail Side Panel: Procedure</td>
</tr>
<tr>
<td></td>
<td>Creating Contacts Using Oracle Sales Cloud for Gmail: Examples</td>
</tr>
<tr>
<td></td>
<td>Sharing Your E-Mail with Oracle Sales Cloud Users: Example</td>
</tr>
<tr>
<td></td>
<td>Oracle Sales Cloud and Gmail Synchronization Settings: Explained</td>
</tr>
<tr>
<td></td>
<td>Oracle Sales Cloud and Gmail Synchronization: Explained</td>
</tr>
<tr>
<td>20</td>
<td>Using Mobile Applications</td>
</tr>
<tr>
<td></td>
<td>Using Mobile Applications: Overview</td>
</tr>
<tr>
<td></td>
<td>Oracle CX Cloud Mobile</td>
</tr>
<tr>
<td></td>
<td>Sales Cloud Mobile</td>
</tr>
<tr>
<td></td>
<td>Oracle Mobilytics</td>
</tr>
<tr>
<td>21</td>
<td>Using Social Networking</td>
</tr>
<tr>
<td></td>
<td>Social Networking: Overview</td>
</tr>
<tr>
<td></td>
<td>Adding Oracle Social Network in Oracle Sales Cloud: Overview</td>
</tr>
<tr>
<td></td>
<td>FAQs for Using Social Networking</td>
</tr>
<tr>
<td>22</td>
<td>Managing Service Requests</td>
</tr>
<tr>
<td></td>
<td>Service Request Management: Overview</td>
</tr>
<tr>
<td></td>
<td>Service Request User Tasks: Overview</td>
</tr>
</tbody>
</table>
# Using Sales Lightbox

<table>
<thead>
<tr>
<th>Topic</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Lightbox: Overview</td>
<td>245</td>
</tr>
<tr>
<td>Available Lightbox Actions for Different Content Types</td>
<td>245</td>
</tr>
<tr>
<td>Creating Content</td>
<td>248</td>
</tr>
<tr>
<td>Uploading Content</td>
<td>252</td>
</tr>
<tr>
<td>Updating Content</td>
<td>253</td>
</tr>
<tr>
<td>Searching for Content</td>
<td>255</td>
</tr>
<tr>
<td>Downloading and Opening Content</td>
<td>256</td>
</tr>
<tr>
<td>Sharing Content</td>
<td>260</td>
</tr>
<tr>
<td>Working with Thumbnail Images</td>
<td>263</td>
</tr>
<tr>
<td>Deleting Content</td>
<td>264</td>
</tr>
</tbody>
</table>
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 contains information to help sales managers, salespeople, and other sales users to perform day-to-day business tasks using Oracle Sales Cloud.

This guide describes how to:

- Manage customers and contacts.
- Log sales calls.
- Manage calendars and activities.
- Create and update sales campaigns and sales leads.
- Create, monitor, and update opportunities.
- Manage partner relationships.
- Create and update territories and quotas.
- Participate in social conversations.
- Generate leads from predictive analysis recommendations.
- Use mobile applications with Oracle Sales Cloud.
- View key metrics, such as pipeline revenue and quota performance, at a glance.

Related Guides

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

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Applications Cloud Using Common Features</td>
<td>Describes user tasks and features that are common across Oracle Applications Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Leads</td>
<td>Describes the user tasks for creating leads and managing the various aspects of leads.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Campaigns</td>
<td>Describes the user tasks for creating campaigns and managing the various aspects of campaigns.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Incentive Compensation</td>
<td>Describes the user tasks for the incentive compensation business process, from creating and managing compensation plans to reviewing and monitoring incentive plans and performance data.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Customer Data Management</td>
<td>Describes user tasks to manage customer information and customer data quality.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Customer Contracts</td>
<td>Describes user tasks for customer contracts including creating customer contracts, authoring of contract terms, and maintenance and configuration of contracts.</td>
</tr>
</tbody>
</table>
### Related Topics

- [Oracle Help Center](#)
2 Getting Started

Using Oracle Sales Cloud: Overview

Oracle Sales Cloud lets sales representatives and other sales personnel quickly and easily perform core sales tasks on a variety of interfaces, including computers, laptops, tablets, and smartphones. The intuitive design of the user interface (UI) reduces the need for application training and promotes faster adoption by sales personnel. Analytics built into the UI provide information when and where it’s needed. The following are some of the key capabilities of Oracle Sales Cloud:

- Manage customers and contacts.
- Log sales calls.
- Manage calendars and activities.
- Create and update leads.
- Create, monitor, and update opportunities.
- Access the product catalog and add products to opportunities and leads.
- Create and update territories and quotas.
- Manage sales forecasts.
- Participate in social conversations.
- Upload and access content in the Lightbox content library.
- Manage partner information.
- Use mobile applications to manage customer information, leads, and opportunities.
- View key metrics, such as pipeline revenue and quota performance, at a glance.

Understanding the Sales Cloud UI and Features

The following is an introduction to the UI and a brief discussion of some of the features available in Sales Cloud:

- Home page:
  - The home page offers a central location from which you can navigate to complete important tasks, like updating contact, account, lead, or opportunity information.
  - The home page contains a springboard and a panel that, based on setup, shows either company announcements or social networking conversations.

- Springboard:
  - The springboard is the area on the simplified UI home page, and above all simplified pages, that contains a set of functional area icons.
  - The springboard provides icons that you can use to open pages and applications.

- Sales analytics:
  - Use the dashboard and infolets page to view and drill into supplied infolets that contain key metrics, such as Top Open Deals or Stalled Deals. If you have access to infolets, you see a series of pagination controls (clickable dots) near the top of the page.
Gain insight into your performance against your quota.

View your pipeline, including total opportunity revenue, revenue per sales stage, and opportunity count in the pipeline.

View past and upcoming activities.

See separate views of the dashboard as salesperson or sales manager.

For more information on analytics, see the Oracle Sales Cloud - Using Analytics and Reports guide.

- Leads:
  - View and edit lead information, including products, budget, and deal size.
  - Create, qualify, and convert leads.

- Opportunities:
  - Create and manage opportunity information, such as owner, product revenue, win probability, sales stage, and more.
  - Manage all the information related to your opportunities like relationships, contacts, appointments, and sales team members from one, convenient portal.

- Sales forecasting:
  - View forecast, pipeline, and won amounts for current, past, and upcoming quarters.
  - See forecast trends over time.

- Accounts and contacts:
  - Create and manage accounts, contacts, and households for B2B selling.
  - View and manage associated items, such as interactions, leads, opportunities, and appointments.

- Partner management:
  - Manage partners, including their leads and opportunities.
  - Review notification requests and manage activities and notes related to partners.
  - Manage partner enrollments.

- Scheduling and calendars:
  - Create and manage appointments and tasks, and associate them with the contacts, leads, and opportunities you're working on.
  - Manage team calendars and access autogenerated tasks.

- Social:
  - Participate in conversations with other sales team members.
  - Associate conversations with sales accounts, contacts, leads, and opportunities.

- Configuration by administrator:
  - Set any one of several different themes to change look and feel.
  - Change icon style, button shape, and logo to personalize the user experience.
  - Customize news and announcements on the home page.
For more information on UI navigation, see the topic, Navigating in the Application: Explained, available in the online help. Administrators should refer to the topic, Understanding Default Navigation Components.

Extending and Customizing the UI

After your services are up and running, several customization options are available for you to tailor the UI to company business needs, such as:

- Specify customization layers, for example, site or role
- Configure the dashboard by adding or removing infolets
- Extend table and form regions
- Reorder subtabs
- Show or hide fields
- Add and remove custom fields
- Change field labels
- Make fields read-only

Note that some of these extensions are done using Application Composer and some are done with Page Composer. For more information on extending the UI, see the Oracle Sales Cloud - Customizing Sales guide.

Related Topics

- Navigating in the Application: Explained
- Oracle Sales Cloud Help Center

Proxies: Explained

You can designate another user as a proxy to sign in to the application and perform tasks on your behalf. Proxies are helpful when you can’t perform the tasks in person during a specific period.

⚠️ Note: This functionality is currently not available for Oracle HCM Cloud users.

In the global area, click your name, and from the Settings and Actions menu, select Set Preferences. On the Preferences page, click Proxies.

Impersonation

When your proxies sign in to the application on your behalf, they would be working in an impersonation session. During that period, your proxies have unrestricted access to your account, except that they can't change your preferences. The application supports a scenario where you and your designated proxies can sign in at the same time.

When you sign in, you would see all the work your proxies did on your behalf.
Security

You don’t need to share your password with your proxies. While signing in to your account, your proxies must enter their password to verify their identity.

How can I perform tasks on behalf of another user?

To work in the application as another user:

> **Note:** This functionality is currently not available for Oracle HCM Cloud users.

1. Click your user name in the global area.
2. Click the **Switch To** button and select the user.
3. Enter your password.

After you’re done working as that user, switch to another assigned account, or sign out and sign in again to your own account.

As a proxy for the selected user, you can access all the data and tasks that the actual user is entitled to. But, you can’t change the user’s preferences.

> **Note:** All tasks that you perform are logged as though the actual user performed them.
3 Using Search

Searching Oracle Sales Cloud: Explained

There are two different ways of searching Oracle Sales Cloud:

- You can use the global search located at the top of the application page to search across objects in the application:

```
[Image of global search bar]
```

- 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.

```
[Image of Opportunities search bar]
```

This topic provides a brief overview of the two types of searches. Related topics provide tips for using them.

Global Search

Enter your search term in the global search box located at the top of each page to find all the records related to that search term. For example, entering the name of a contact as a search term retrieves not only the information about the contact herself, but also all of the opportunities, leads, and activities that mention that contact.

Global search makes it possible to search all the key fields in the following objects. Your application administrator determines which of these objects are available for search in your implementation.

- Accounts
- Activities
- Campaigns
- Contacts
- Forecasts
- Households
- Leads
- Opportunities
- Partners
Not all objects or fields are searchable. Global search does not permit searches of child objects, or through notes or presentations you have uploaded, for example. Attachment searches are restricted to the attachment file names. Nor can you use global searches to find calculated values, such as the currency value of an opportunity or the due date of an activity. While the application administrator can make your custom objects searchable, you cannot search custom child objects. Custom objects have their own work areas. Custom child objects appear as tabs of other objects.

Global search depends on an indexing process to make new records available for search. Your application administrator schedules a separate process to periodically index each application object. The indexing processes are usually scheduled to run once a day in off-peak hours to minimize performance impact. Any new record you create is not available to search by you or by others until the indexing process has run.

Searching in the Work Areas

Use the search in the different work areas to quickly find a particular object you are looking for in one of three ways as highlighted in the following figure:

- By typing the object name in the **Find** box.
  
  As you type, the application matches the search term to the records you accessed, created, or updated recently and displays them in the Recent Items window.

- By selecting a list. A list displays records using search criteria you or an administrator saved previously.

- By clicking **Show Advanced Search** (the filter icon) and entering your search criteria in the Advanced Search panel.

Searching Using the Advanced Search Panel in Work Areas

When you click the **Show Advanced Search** icon (filter icon) in the work area landing pad, the application displays the Advanced Search panel showing the search criteria for the list displayed on the page. You can modify the existing search criteria for the list, add additional search terms, or select a different list (saved search) as the basis of your search.

> **Note:** The Advanced Search panel uses the term **Saved Search** instead of **List**.
Clicking **Search** initiates the search. Clicking **Save** saves your changes or creates new list, as described in related topics.

**Finding the Most Recent Records Created in the Application**

Searches in Oracle Sales Cloud depend on two indexing processes that are set up by the application administrator to run periodically, one for the work area searches and another for the global search. Work area searches are indexed every five minutes, so use this type of search for finding the most up-to-date information. You will want to use the work area search to find the latest information about a customer appointment, for example. Oracle recommends global searches be indexed once every day, so use global searches for finding information across different objects.
Even though new records you create are unavailable for search until they indexed by each search, they are always available for you from the Recent Items list. As you enter a search term in either the global and work area searches, the application automatically displays a list of records you personally created, edited, or accessed in the last 30 days (or another interval configured by the administrator). Each search maintains its own list of Recent Items. When you use the global search, you do not see the recent items from the work areas and vice versa.

**Tips for Using Global Search in Oracle Sales Cloud**

Here are some tips on using global search.

**Select from the List of Recent Items**

Start typing any one of the words in the search term. Capitalization doesn’t matter.

As you type, the application matches your entry to your recent searches and any records you accessed and displays them in the Recent Items window. If you see what you are looking for, just select it from the list.

**Search on Complete Words**

If you don’t find what you are looking for among the Recent Items, then:

1. Finish typing the complete search term.
2. To speed up your search, you can narrow the list of objects searched, by selecting the down arrow to the right of the search field.

3. Click **Search** (the magnifying glass icon).

   The application displays a list of records that contain your search term. If there is a search term with similar spelling, then the application displays the term above your results.

---

**Refining Your Search Using Filters**

Click **Show Filters** to display the filters available for refining your search.
You can filter by object or date.

### Searching on Partial Words and Exact Phrases

You can use quotation marks around your search terms to search for exact phrases. You can also search on partial words.

- Put an asterisk (*) after two or more letters, and you get all the names with words that start with those letters. For example, searching on `pin*`, returns Pinnacle Technologies and All Pines Furniture.
- Put the asterisk in the middle of the word to indicate any number of letters. For example `pi*acle`, returns both Pinnacle and Pinacle.
Note:

- You cannot use the asterisk at the beginning of a search term in global searches.
- Using the asterisk can slow your searches, so enter a whole word if you know it.

Tips for Searching in Oracle Sales Cloud

Watch: This tutorial provides tips for searching accounts, opportunities, leads, and other objects in Oracle Sales Cloud.

Searching for Objects in Their Work Areas: Explained

This topic describes how to search quickly for accounts, opportunities, leads, and other objects. Use the following methods for searching:

- Start typing the object name and select the item from the list of recent items.
- Search for names using complete words or phrases.
- Search for partial words using the percentage sign (%) to stand for missing characters or words.
- Select a list, click the Show Advanced Search (the filter icon), and modify the search criteria.
- Search for the account itself first to find activities, leads and other objects related to an account.

Typing the Object Name and Reviewing the List of Recent Items

To search for an object by name, navigate to the object you want to search, click in the Find field, and start typing any one of the words in the name. Capitalization doesn’t matter.

As you type, the application matches your entry to the records you accessed, created, or updated recently and displays them in the Recent Items window. If you see what you are looking for, just select it.
Searching by Object Name Using Complete Words or Exact Phrases

If you don’t find what you are looking for among the Recent Items, then finish typing the word and click **Search** (the magnifying glass icon). The application displays a list of records with names that contain your search term, followed by records with related words, just in case you didn’t type the word correctly. For example, if you are searching for accounts using the word **Software**, as shown in the figure below, then the application first displays the account names that contain that word, such as Compucon Software and Forte Software Inc. (1), followed by names with similar spellings such as Softgear Inc. (2).

If you want to find the exact name you are searching for, then put quotation marks around your search terms. For example, "**Forte Software Inc"**, returns just that one record.

Searching for Partial Words in a Name

You can also search for partial words.

- Put a percent (%) sign after two or more letters, and you get all the names with words that start with those letters. For example, searching on **pin%**, returns Pinnacle Technologies and All Pines Furniture.
- Put the percent sign at the front of the term, and you get records that end with your term. For example, searching for **%ard**, returns The Board of Education and Edward Ward and Co.
- Put the percent sign at both ends, and you get all the customer names with words that include those letters.
Note: You can use the percent (%) sign at the beginning of your search term only in the **Find** field on the main page of each object.

Using the percent (%) sign can slow your searches, so enter a whole word if you know it.

**Searching Using Predefined Lists and Modifying the Search Criteria**

Searching by name is not the only way to find what you need. You can search by selecting one of the lists you or an administrator has created from the **List** list and use the following procedure to modify the search terms.

1. Click **Show Advanced Search** (the filter icon highlighted in the following figure).

The Advanced Search window appears, showing the current search criteria for the list that is displayed on the page.
2. You can choose different search criteria by selecting a different list from the **Saved Search** list.

3. You can then modify the search by:
   
   - Changing the scope of the search by choosing a different record set.

   For example, selecting **All records I can search** from the **Record Set** list, searches all the records you can access. Selecting **Records I own** searches only the records where you are listed as the record owner. The available record sets vary by object.
Tip: To improve search performance, choose the more restrictive record set or restrict the range of records you are searching by adding other search terms such as state or country.

- Adding new search terms by clicking the Add button.
- Changing the values and operators.

You must enter values for fields highlighted by asterisks.
- Reordering the search fields by clicking Reorder.

Note: You cannot delete any of the fields provided by Oracle. You can only delete fields you added.

4. Click Search.

The application displays the search results.

5. To save your modified search as a new saved search (list) do the following:

   a. Click Save.

      The Create Saved Search window appears.

      ![Create Saved Search window]

      b. Enter a new name for the saved search.
      c. Optionally, you can set this search to be the list that appears whenever you navigate to the work area by selecting the Set as Default option.
      d. Click OK.

Searching for the Account to Access Opportunities and Other Related Objects

Search for the account and then drill down to the object from the Account Overview page. Whatever search method you use, always remember that you may not have permission to access all information in the application. For example, to see an opportunity, you may have to own the sales territory, be on the sales team, or manage someone who is.

There may be a delay of a few minutes between the time you create or update a record and when you and others can search for it. That’s because the application must update an index to enable searches. You can access newly-created items from the Recent Items list in the meantime.
What's the difference between the global search and the work area searches in Oracle Sales Cloud?

Global search, located at the top of the page, makes it possible for you to search across multiple objects in Oracle Sales Cloud. The searches available on the different work area landing pads search on a single object.

The following table details the key differences between the two search methods.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Global Search</th>
<th>Work Area Searches</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Scope</td>
<td>Searches key fields in multiple objects across Oracle Sales Cloud.</td>
<td>Makes it possible for you to search for an object by name or by using multiple search criteria.</td>
</tr>
<tr>
<td></td>
<td>Searching on a contact name retrieves not just the contact record, but also related opportunities, leads, activities, and other objects.</td>
<td></td>
</tr>
<tr>
<td>Indexing Frequency</td>
<td>Usually once a day.</td>
<td>Usually every five minutes.</td>
</tr>
<tr>
<td>List of Recent Items</td>
<td>Displays recent items for all of the objects you enabled in the search.</td>
<td>Displays the recent items relevant the work area.</td>
</tr>
<tr>
<td></td>
<td>Lists records you recently created, edited, or accessed. This includes records that haven't been indexed yet.</td>
<td></td>
</tr>
<tr>
<td>Wild Cards</td>
<td>Use an asterisk (*) at the end or middle of a word to indicate missing letters.</td>
<td>Use a percent sign (%) at the beginning, end or middle of a word to indicate missing letters.</td>
</tr>
<tr>
<td>Saved Searches (Lists)</td>
<td>Saved searches are not available unless specially configured by your application administrator.</td>
<td>You can search using one or more fields by creating saved searches (lists). For example, you can create a saved search to display a list of all active accounts in New York.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Application administrators can create saved searches for others in the organization.</td>
</tr>
</tbody>
</table>

Creating Your Own Personal List

**Watch:** This tutorial shows you how to create your own personal list in the different Oracle Sales Cloud work areas.
Creating a New List in a Work Area: Worked Example

You can create a new list in any of the work areas that support lists, including, opportunities, leads, and accounts, by modifying one of the lists supplied by Oracle. The list details differ for each object, but the principles are the same. You can use this example, which shows how to create a list to display all accounts you can view in the state of New York, to learn how to create a new list in any work area.

You can create new lists to search by multiple fields, including custom fields, by copying and modifying the search criteria for lists supplied by Oracle. For optimal search performance, the custom fields used in search must be created as indexed fields.

The lists you create are available to you only. However, sales administrators, and other users with customization privileges, can create lists for different sets of users by using the same sets of steps outlined in this topic while working in Page Composer.

⚠️ Tip: To improve saved search performance, restrict your saved searches to smaller record sets. For example, rather than searching all the records you can see, search all the records in your territory hierarchy. Or restrict your searches to a smaller geographical area. For example, search all the accounts in one state instead of the whole country.

Creating the List

1. In the work area landing pad, click **Show Advanced Search** (the filter icon) to the right of the List field.
The Advanced Search panel appears on the left side of the page.

2. From the Saved Search list, select the saved search you want to use as the basis of your new saved search. In this example, you are creating a list of all accounts in New York, so you can use the default My Accounts saved search.

   Tip: To create a saved search entirely with your own fields, select Account Name.

3. In this example, you want to display all of the New York accounts you can access, so select All records I can see from the Record Set list.

   The record set specifies the set of records to be searched. To improve search performance, you want to restrict your searches to a smaller record set. In this example, however, you can select All records I can see because you are restricting the number of records searched by adding the state field.

4. Click Add.

5. Select State from the list.

6. Enter NY in the State field.

7. Click Save.

   The Create Saved Search window appears.
8. Enter a new name.

9. If you don't want the new search to become the default, deselect the **Set as Default** option.

10. Make sure the **Run Automatically** option remains selected. This selection runs the query each time you select the list in the UI.

11. Enter a new name, for example, **NY Accounts**.

12. Click **OK**.

The work area landing pad and the Advanced Search Panel display the new search and the search results.

**Deleting or Hiding a List: Procedures**

Use the procedures in this topic to learn how to delete any lists you have created and how to hide the lists supplied by Oracle from the UI.

Unless you are a Sales Administrator or a user with customization privileges, you cannot delete the lists supplied by Oracle. You can only hide them. For example, you can hide the default **My Accounts** list, if you created a replacement for the default list.

**Note:** If you attempt to delete a list supplied by Oracle, it will remain deleted only during the duration of the session.

If you hide a list, you are affecting your own UI only. However, sales administrators and other users with customization privileges, can hide and delete lists for sets of users when they perform the same procedures with Page Composer open.

**Deleting Lists You Created**

Use these steps to delete any lists you created.

1. On the work area landing pad, click **Show Advanced Search** (the filter icon).

   The Advanced Search panel appears on the left side of the page.

2. Select **Personalize** from the **Saved Search** list.
The Personalize Saved Searches window appears.

3. Click **Delete**.
4. Confirm your deletion by clicking **Yes** on the warning.

Hiding Saved Searches Supplied by Oracle

1. On the work area landing pad, click **Show Advanced Search** (the filter icon).

   The Advanced Search panel appears on the left side of the page.

2. Select **Personalize** from the **Saved Search** list.

   The Personalize Saved Searches window appears.
3. Select the saved search you want to hide and deselect the **Show in Search List** option.

4. Click **OK**.

   A saved search supplied by Oracle remains available for future use but does not display in the work area. You can restore the saved search to the list in the future by selecting the **Show in Search List** option.

---

**How can I create saved searches with just one custom field?**

You can create a saved search based on a custom field by customizing one of the two single-field saved searches provided by Oracle: Name and Close Date. For opportunities and leads, customize the Close Date list. For all other objects, including accounts, customize the Name list, for example, the Account Name list or the Contact Name list. Although you can only create a new search by editing an existing saved search and you cannot delete any of the existing fields, you can leave the value of some fields blank, effectively enabling you to search on the custom field. For optimal search performance, the custom fields used in search must be indexed for search.

For example, follow these steps to create a saved search for all accounts with a particular value of your custom field.

1. On the work area landing pad page such as Accounts, click **Show Advanced Search** (the filter icon).
   
   The Advanced Search panel appears on the left side of the page.

2. Select **Account Name** from the **Saved Search** list.

3. Click **Add** and select the custom field.

4. Enter a value in the custom field.

5. Click **Save**.

   The Create Saved Search window appears.
6. Enter a new name for your search.
7. If you want the new search to become the default, select the **Set as Default** option.
8. Make sure the **Run Automatically** option remains selected. Selecting this option runs the query each time you select the list in the UI.
9. Click **OK**
4 Managing Activities and Calendar

Activities: Explained

This topic provides an overview of Activities, including how to create, manage, and interact with them.

Understanding Activities

Activities keep track of things you plan to do, like a task or an appointment, or things that you've already completed, like logging a customer call. There are three types of activities:

- Tasks are to-do items assigned to people or groups, and also used to record completed customer interactions that were not scheduled in your calendar as appointments.
- Appointments are calendar events (for example, a meeting with another person, or a scheduled phone call).
- Call Reports are created to record a brief summary of a call. They can be created from an appointment, a task, or standalone from the Activity list page. When created from a task or appointment, all pertinent data is auto-populated onto the call report.

Tasks and appointments can be meetings, calls, demonstrations, events, and so on. The difference between a task and an appointment is that a task appears in a task list and has a due date and status, while an appointment is scheduled on your calendar with a specific date and time.

Navigating the Activities Page

The Activities page is the central location for managing tasks and activities. It includes three tabs: Calendar, Tasks, and Activities.

On the Activities page, you can:

- Create new tasks and appointments
- View reports and analytic information
- Manage your calendar (and view others’, with permission)
- Search for and view tasks and appointments
- Manage your tasks, and view at a glance which ones are overdue

Creating New Tasks and Appointments

There are several ways you can create a new task or an appointment:

- Click Create Task or Create Appointment on the right side of the All Activities tab. A new blank task or appointment is created with only basic information filled in.
- Click Create at the top of the lists of tasks or appointments on the Appointments tab, the All Activities tab, or the My Tasks list.
- Navigate to a specific record (for example, a lead or an opportunity) where you want to create a related task or appointment, and create it from the Activity Center on that page. A task or appointment is created with automatically populated with information about the related record.
• Create a follow-up task or appointment for an existing one by selecting Save and Create Follow-up Task or Save and Create Follow-up Appointment from its page.

Managing Your Calendar
The Appointments tab is where you can keep track of all your appointments on a calendar view. You can:

• View your appointments in a daily, weekly, or monthly format, and either graphically or as a list.
• Drag and drop appointment from one day to another.
• Create new appointments.
• View and edit existing appointments.
• View your colleagues' appointments if you have permission.

Searching and Viewing Tasks, Appointments, and Reports and Analytics
The All Activities tab is where you can search for specific tasks and appointments. You can search across both tasks and appointments at the same time, using a search date that includes the start date for appointments and the due date for tasks.

You can view a list of tasks and appointments, displaying all or some of their fields depending on what you want to see. The tasks and appointments are displayed in a convenient single grid, with relevant information filled in only when applicable (for example, some fields apply only to tasks and some only to appointments, so for the other type of item, these fields will show as empty). Appointment and task icons make it easy to differentiate between the two.

The Analytics tab lets you view reports and analytics that you’ve created, as well as those that others have created and shared with you. You can also create new ones and share them with your colleagues.

Managing Your Tasks
A list of all your tasks that include a Due Date is displayed on the Tasks tab, allowing you to see at a glance which ones are due on which dates, and icons help you spot overdue tasks quickly. You can use the My Tasks list to sort tasks by due date, subject, or priority, add a new one, or edit or delete one that’s already in the list.

Delegating Activities
When you create an appointment, you become the default owner. The Edit Appointment page includes an owner field that you can change to delegate your appointments to someone else. The appointment will then appear on the new owner’s calendar. When you delegate an appointment, your name is automatically entered into a Delegated By field. This gives you and the owner full edit access to the appointment so that you can both update the appointment as necessary. This new functionality also applies to tasks. You can delegate tasks and appointments independently.

You can also update the activity owner from the Resources subpage, accessible from the Edit Task and Edit Appointment pages. The owner and Delegated By user both have full edit access to the activity. If necessary, you can manually add the Delegated By user to the Resource team.

The profile option for Activity Delegation is found within the Manage Activity Profile Option folder in Setup. The profile option to enable activity delegation are:

• ZMM ACTIVITY APPT DELEGATION
• ZMM ACTIVITY TASK DELEGATION
After the Delegation profile option is enabled, if you modify the owner:

- the Delegated By field is automatically updated.
- the replaced owner is removed from the activity Resources table.

The profile options are delivered disabled, but you can enable them for Task, Appointment, or both. The Delegated By field is hidden by default. The administrator can make the field visible in Task and Appointment from Application Composer.

Activity Notification: Explained

Activities generate notifications when you perform various tasks or make certain updates. This topic explains how the notification process works.

Notification Events

Notifications are sent by e-mail or on a global notification list (also called a bell notification list). You can choose whether to receive e-mail, a notification in the notification list, or both. Notification can be sent for each of the following events, and is triggered when the change is saved.

When an appointment is:

- Created.
- Updated.
- Deleted.
- Sending out a reminder.

When a task is:

- Created.
- Updated.
- Deleted.

/> **Note:** For updates, notifications are triggered on any update except the settings and values specific to each individual user:

- Show Time As
- Reminder
- Response

Notification messages are displayed only on the bell notification list. The messages are not displayed in the Worklist for notifications and approvals.
Call Reports: Explained

A call report is a central place for salespeople to capture what happened in a sales activity, make related changes, and track key updates. Call reports can boost salespeople’s productivity by saving time, increasing visibility into their business, and selling more in less time.

A call report is a type of activity like tasks and appointments. You can create call reports for scheduled appointments or ad hoc call reports from the Activities tab. Each scheduled appointment can have multiple call reports, created by different salespeople. The call reports for an appointment are listed in and viewed from that appointment. Salespeople can also create ad hoc call reports to report sales activities that are not scheduled on their calendar.

Note: The administrator must use Application Composer to enable the Create Call Reports button on the Activities tab, the Activities list and Task.

Call reports record a snapshot of the outcome of the sales activity and key changes, including:

- Outcome summary, meeting minutes, complete objectives, attendees, attachments, notes, and so forth.
- Related objects, such as appointments, accounts, opportunities, and leads

Appointment resources and others who have access to an appointment can create a call report from it. Multiple call reports can be created from one appointment.

Adding and Removing Objectives

Appointment objectives are copied over to the call report by default. You can add additional objectives, or remove existing ones.

To add objectives, you can either select them from a predefined list or type free text to add new ones. Predefined objectives include:

- Demo product
- Determine next steps
- Discuss proposal
- Identify stakeholders
- Review RFP or RFI (Review Request for Proposal or Request for Information)

You can check an objective in a call report to mark it as complete, or deselect it to mark it incomplete. Objectives copied over from the appointment or added by user are deselected by default.

Appointment Contacts and Resources

Appointment contacts and resources are copied to the call report. You can add or remove contacts and resources. You can also check or deselect a contact or resource’s attendance status to indicate whether he or she attended the meeting.

- Contacts that are defaulted from the appointment are marked as attendees by default.
- Resources that are defaulted from the appointment are marked as attendees by default if the resource’s response in the appointment is not Declined.
Resources and contacts that are not defaulted from the appointment and added by the user are marked as attendees by default.

Appointment Outcome
You can select an appointment outcome from a list of predefined values. Your sales administrator can add or remove values from this list as needed. Default values are:

- Call answered
- Call transferred
- Captured issue
- Failed
- Left message
- Not available
- Provided information
- Successful
- Incomplete
- At risk
- Customer undecided

Attachments and Notes
You can add attachments to a call report in the same way that you add them to other objects.

Anyone who has access to the call report can create notes on it. Call reports support both internal and external notes. You can use external notes to share with external contacts.

Any user who can view the call report can see non-private notes, but only the note creator can see private notes.

Call Report Security
Call reports include a Private setting, which determines who can view it:

- If the call report is set to Private, then only the call report resources can view it.
- If the call report is not set to private, then anyone who can view the related appointment can view the call report.

Call Reports and Oracle Social Network
You can share a call report on the call report Oracle Social Network wall. In Manage Oracle Social Network Objects setup, you can enable Activity on Oracle Social Network and configure the attributes that can be shared on Oracle Social Network.

My Calendars: Explained
My Calendars is a side panel where you can manage calendar views for specific opportunities or accounts to which you have access. My Calendars includes Team Calendars. You can navigate from one calendar to another, gaining insight on the status of deals, or the availability of team members.
Viewing Calendars
You can view calendars by day, week, month, or agenda. You can view the status of other deals by selecting a different calendar listed in the side panel. The steps to view calendars using the side panel are the same for opportunity and account. In the following procedure, account is used as an example.

To view appointments for an account:

1. Click Activities on the Home page, and then click Manage Calendar.

   The Calendar side panel opens

2. Select Create Account Calendar, from the Other Calendars drop-down list.


4. Click Save and Close.

   The calendar name defaults as the account name but is editable. Account team members who own an appointment, display under the calendar name in the side panel.

Switching to Deal Calendar
Deal Calendar allows you to view others’ calendars. You can use Calendar and Appointment Preferences to grant view access to your own calendar to others as needed.

Moving Around the Deal Calendar
You use arrow icons to move backward and forward. Depending on whether you’re in Weekly or Daily view, you’ll move forward or backward one week or one day.

Click Today, to go back to the current day (in Daily view) or the week containing the current day (in Weekly view).

Weekly View
The default calendar view is the Weekly View. From here, you can see all of the items on your calendar for the week. On the left, each user added to the team calendar is displayed (by default only the signed-in user is displayed, as in single calendar mode). Each day shows:

- Start time of appointment, with recurrence icon (if applicable)
- Whether the appointment is multi-day (indicated by an arrow)
- Appointment subject

Clicking on recurring appointments displays a dialog where you can view and edit the recurrence information. Nonrecurring appointments display the edit page for the appointment.

You can only edit your own appointments. Even if your peers have given you permission to view theirs, you can’t edit them. Appointments marked by others as Private display as Busy on their calendar entry, and do not include details.
Day View

On the Day View, you can see all of the items on your calendar for the current day. On the left, each user added to the team calendar is displayed (the default only shows the signed-in user).

Along the top are the hours of each day, where the calendar entries are displayed. Each day shows:

- Start time of appointment, with recurrence icon (if applicable)
- Whether the appointment is multi-day (indicated by an arrow)
- Appointment subject

Clicking on recurring appointments displays a dialog where you can view and edit the recurrence information. Nonrecurring appointments display the edit page for the appointment.

You can only edit your own appointments. Even if your peers have given you permission to view theirs, you can’t edit them. Others who can edit other users’ appointments include:

- The administrator
- The user’s manager, if the person is in their resource hierarchy and the manager has the Sales Manager duty role.

Appointments marked by others as Private display as busy on their calendar entry, and do not include details.

Appointment Colors

The legend at the bottom of the calendar displays the colors associated to different appointment types. If an appointment is of one of these types, the appointment box in the calendar is displayed in that color. You can change these colors using Setup Manager.

Appointments that show a user as busy (displaying no details because you don’t have access to their record) display in gray, the same color as records with no type.

Adding Appointments

You can add new appointments to the calendar by clicking the Create Appointment button. If you've checked the check boxes next to the user names in your team calendar, then those users will automatically be added as resources in the new appointment dialog box. This is a quick way to add users to a new appointment.
Setting Up Appointment Visibility: Worked Example

You can allow other users access to your calendar appointment details by giving them permission to view them.

Setting Up Appointment Visibility

1. Click your user name and select **Set Preferences** under Personalization.
2. Select **Calendar and Appointment Preferences**.

3. Select the individuals that you want to share your appointment details with by clicking the + icon and adding their names in the **GranteeName** field. The **AccessLevel** value should be set to **Show appointment details**.
The users you select will be able to see your calendar appointment details from the Calendar page by selecting your name in the Resource list.

Creating Tasks from a Task Template: Procedure

Sales representatives can create tasks for a business object from a task template. First select a set of tasks for a template task and then create tasks. In this topic, the opportunity business object is used as an example. However, the procedure to create task templates is the same for all objects.

Note: The Create Task from a Template action is only available on simplified SUI. However, tasks can be autogenered from a task template and displayed in the Activities subtab in the simplified UI. For example, a task template is associated with a sales stage. On updating the sales stage, the autogenerated tasks appear in the opportunity Activities tab.

To create tasks from a task template:

1. From the Navigator, click Opportunities.
2. Select the opportunity for which you want to create a task.
   The opportunity opens.
3. In the Activity Center section, click the Add icon, and then click Create Tasks from a Template. If the administrator hasn’t set up task templates, a warning appears.
4. Select the template name from the available task templates.
5. (Optional) Enter the name of the owner of the task. If the field is blank, the signed-in user is set as default as the owner of the task.
6. Click OK.
   The tasks are created from the template.
FAQs for Managing Activities and Calendar

What activities does selecting My Open Activities display?

When you select the **My Open Activities** list in the Activities work area, the application displays a list of all of the future appointments and open tasks where you are listed as a resource. You are automatically a resource if you created the activity or you can be assigned as a resource by another resource or an automated process.

What activity records do the different record sets permit you to search?

The different record sets provided in the Saved Searches window restrict your saved searches to different sets of activities. The following table lists and describes the record sets for activities. Not all record sets are available to all users. For example, the record set involving subordinates is available only to managers.

> **Tip:** To improve saved search performance, restrict your saved searches to smaller record sets. For example, rather than searching all the records you can see, search all the records you and your subordinates own. Or restrict your searches to a smaller geographical area. For example, search all the activities in one state instead of the whole country.

<table>
<thead>
<tr>
<th>Record Set Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I own</td>
<td>Activities you either created or ownership was assigned to you.</td>
</tr>
<tr>
<td>I am a resource</td>
<td>Activities where you are a resource.</td>
</tr>
<tr>
<td>My subordinates own</td>
<td>Activities owned by you and your subordinates.</td>
</tr>
<tr>
<td>All records I can see</td>
<td>Activities that you can view based on your resource team membership, sales territory assignments, your position in the organization, and security permissions. This set of records is available only if you enable it by setting the profile option ZMM_ACTIVITY_ENABLE_ALL_RECORDS to Yes.</td>
</tr>
</tbody>
</table>

To enable this profile option, do the following:

1. While signed in as a sales administrator or setup user, navigate to the Setup and Maintenance work area.
2. Search for the Manage Activity Profile Options task and click **Go to Task**.
The Overview page displays the Manage Activity Profile Options on the All Tasks tab.

3. Click the ZMM_ACTIVITY_ENABLE_ALL_RECORDS link.

The Manage Activity Profile Options page displays the Search Results.

4. In the ZMM_ACTIVITY_ENABLE_ALL_RECORDS: Profile Values region, select Yes from the Profile Value list.

5. Click Save and Close.

---

### How does the Show filter refine my activity list?

The Show filter displays activities based on the following criteria:

<table>
<thead>
<tr>
<th>Show Filter</th>
<th>Tasks</th>
<th>Appointments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>All open tasks with a due date in the defined date range, and open tasks with no due date</td>
<td>All appointments that have a start date of today or in the future within a defined date range</td>
</tr>
<tr>
<td>All</td>
<td>Open tasks with no due date or with a due date within the defined date range. Closed tasks with an end date in the defined date range</td>
<td>Open tasks with no due date or with a due date within the defined date range. Closed tasks with an end date in the defined date range</td>
</tr>
<tr>
<td>Completed</td>
<td>Tasks that are completed within the defined date range</td>
<td>Appointments in the past with a start date that falls within the defined date range</td>
</tr>
</tbody>
</table>

Use the show filter when you:

- Create saved searches for activities.
- Search for activities on associated objects such as opportunities, account.

---

### How can I view activities that are set as private?

You can view activities that are set as private, if you are the owner of an activity, delegated by users, or are resources and contacts of the activity.

**Tip:** The Private check box is hidden by default on the Tasks page. Administrators can use Application Composer to display the check box and enable you to set a task as private.

---

### How can I track customer-facing activities?

You can define your own criteria for an interaction using the Activities feature. Customer interactions are logged either as completed tasks or as appointments using the activity types you want to report on. To track your customer-facing interactions, generate a report to retrieve activities of a specific type with accounts or contacts associated. For example,
you can list all calls with an associated contact. To track a completed task, go to the Activities page from the Customer, Opportunity, or Lead page, and click Log a Call.

How can I view my appointment in a different time zone?

You can use the time zone drop-down list to view the appointment time in a different time zone. The time zone for users is defined in the Regional area within Set Preferences. If no time zone is defined, the appointment time zone displays as null, and appointments are created based on Universal Time Coordinated (UTC) time. You cannot change the default time zone. When appointments include attendees from a different region, the appointment time zone drop-down list can be used to define an attendee-friendly time. For example, a user in Chicago selects 9 A.M., and sets the time zone to Cairo, Egypt time zone. Upon saving, the appointment displays to the Chicago user as 2 A.M., and the time zone drop-down list has the Chicago value.
5 Maintaining Account, Contact, and Household Information

Sales Accounts, Contacts, and Households: Explained

Accounts, contacts, and households enable the comprehensive management of customer information. Oracle Sales Cloud uses customers and prospects to qualify accounts, contacts, and households. Customers and prospects can be organizations (accounts) and individuals (contacts), or group of individuals (households).

You can use the accounts, contacts, and households management capabilities to:

• Create and update accounts, contacts, and households
• Enrich accounts and contacts
• Maintain account hierarchies
• Manage multiple industries classifications

Be aware of the following terminology used throughout the application:

• Account
• Contact
• Household
• Legal entity
• Billing account

Account
Any organization (B2B) can be an account that a salesperson sells to and can be a prospect or customer. You can create leads and opportunities against accounts.

Contact
Any person (B2C) can be a contact. A contact need not be related to a customer. A person may also be both a customer as well as a contact of another customer.

Household
A household is a group of contacts with whom you have a selling relationship. Households provide valuable segmentation information about the household as a whole, as well as summary of information about the household member contacts. Usually all the contacts reside at the same address and have a similar set of attributes that accounts do, such as team members, territories, and contacts.
Legal Entity
A legal entity is a party that can enter into legal contracts or a business relationship, and be sued if it fails to meet contractual obligations.

There are two types of legal entities:

- **Internal**: Customers with a party usage of Legal Entity. Used for selling between different divisions within a single company.
- **External**: Customers with a party usage of External Legal Entity. External customers, that is entities outside of the organization, that fit the definition of legal entity.

Billing Account
A billing account is a party that represents the financial account transactional entity for a given customer. In other words, a billing account is the arm of the customer that deals with all of the customer's financial transactions.

**Related Topics**
- Sales Party Profile Options: Explained

Managing Accounts Information

Sales Accounts: Explained
Account refers to an organization that the salesperson sells to and can be maintained as a prospect or customer.

Creating Accounts
You can create accounts in the following ways:

- Create directly in Oracle Sales Cloud
- Import accounts using file-based import
- Use web service to create an account

Managing Accounts
Use account management capabilities to search for, create, update, delete, merge, and enrich accounts.

Accounts Overview presents you with the following information:

<table>
<thead>
<tr>
<th>Account Tabs</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>Provides a general overview of customer or prospect, opportunities, quotes, orders, leads, active contracts, assets and recommendations, and activities.</td>
</tr>
</tbody>
</table>
## Account Tabs

<table>
<thead>
<tr>
<th>Account Tabs</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Profile</strong></td>
<td>Provides details of the account such as address and contacts. Here you can also:</td>
</tr>
<tr>
<td></td>
<td>• Create and manage account hierarchy</td>
</tr>
<tr>
<td></td>
<td>• Update and verify account address</td>
</tr>
<tr>
<td></td>
<td>• Add industry codes and organization types.</td>
</tr>
<tr>
<td></td>
<td>Use this tab to add the primary contact to the account.</td>
</tr>
<tr>
<td><strong>Team</strong></td>
<td>Shows team members and territories that are part of your account. Here you can also:</td>
</tr>
<tr>
<td></td>
<td>• Add team members</td>
</tr>
<tr>
<td></td>
<td>• Add territories</td>
</tr>
<tr>
<td></td>
<td>You can manually run territory assignment for the account through the Run Assignment process. For example, a sales administrator can manually assign a specific account to verify that expected territories are assigned after territory realignment.</td>
</tr>
<tr>
<td></td>
<td>The assignment action is enabled for the type of account enabled for assignment. If you have enabled assignment for account of type customer, then the assignment object is shown as:</td>
</tr>
<tr>
<td></td>
<td>• Enabled for customer account</td>
</tr>
<tr>
<td></td>
<td>• Disabled for prospect account</td>
</tr>
<tr>
<td><strong>Contacts</strong></td>
<td>Enables you to add and view contacts for the account. Review contacts in the following views:</td>
</tr>
<tr>
<td></td>
<td>• Table view</td>
</tr>
<tr>
<td></td>
<td>• Hierarchy view</td>
</tr>
<tr>
<td></td>
<td>The hierarchy view is an influence map that shows how the contacts are related to each other. Here you can manage reporting relationships and drill into contact details.</td>
</tr>
<tr>
<td></td>
<td>Use this tab to add additional contacts to the account. You must have edit access on the Account to add contacts. To add a contact, you can search by an account. The search results show the contacts and their primary customers and account.</td>
</tr>
<tr>
<td><strong>Opportunities</strong></td>
<td>Enables you to add and view opportunities for the account.</td>
</tr>
<tr>
<td><strong>Quotes and Orders</strong></td>
<td>Enables you to add and view quotes and orders for the account.</td>
</tr>
<tr>
<td><strong>Leads</strong></td>
<td>Enables you to add and view leads for the account.</td>
</tr>
<tr>
<td><strong>Recommendations</strong></td>
<td>Provides a list of products recommended for this account.</td>
</tr>
<tr>
<td><strong>Contracts</strong></td>
<td>If your administrator has enabled this view, then you can view contracts associated with the account and add account contacts.</td>
</tr>
<tr>
<td></td>
<td>If you have appropriate access, then you can preview the contact as a PDF.</td>
</tr>
<tr>
<td><strong>Notes</strong></td>
<td>Enables you to add and view notes for the account.</td>
</tr>
<tr>
<td><strong>Assessments</strong></td>
<td>Enables you to add and view assessments for the account.</td>
</tr>
<tr>
<td>Account Tabs</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Activities</td>
<td>Enables you to and view appointments, tasks, and call logs.</td>
</tr>
<tr>
<td>Assets</td>
<td>Shows a list of assets for this account.</td>
</tr>
<tr>
<td>Relationships</td>
<td>Enables you to add account relationships to other account or contacts that are not directly related to the account but are influential. You can add the same contact to multiple accounts using different relationships. You must add your first contact from the Contact subtab and add your subsequent contacts here. Review the relationships in the following views:</td>
</tr>
<tr>
<td></td>
<td>• List view</td>
</tr>
<tr>
<td></td>
<td>• Diagrammer view</td>
</tr>
</tbody>
</table>

**Note:** You cannot edit a role after you have added a relationship. To update the role, delete the existing relationship and create another relationship with the wanted role.

**Managing Multiple Classification Codes: Explained**

If your administrator has enabled the Multiple Classification Codes option and you have edit access to your account, then you can add or remove multiple industries and organizations for your account. This gives you the flexibility to assign the most accurate industry and organization type to your account that provides greater accuracy for account qualification and territory assignment.

You can assign primary as well as secondary industry and organization type values to your account. You can also load your own industry and organization classifications and use them to qualify your accounts. When an account is assigned multiple classification values, you have the option to use all the values to determine territory and rule-based assignment for accounts, or you can use only the primary account classification.

When you remove the primary organization type, then the application sets the next available organization type in the hierarchy as the default organization type. If there isn't any organization available, then there is no default organization attached to your account. Similarly, when you remove the primary industry code, then the application sets the next available industry code in the hierarchy as the default industry. If there isn’t any industry code available, then there is no default industry attached to your account.

**Viewing and Managing Account Hierarchies: Explained**

You can use Oracle Sales Cloud to view and manage your accounts hierarchically. On the Profile page for a selected account, you can indicate a parent account, and you can create an account hierarchy if one doesn’t already exist or manage the existing account hierarchy.

To access the Profile page in simplified UI, click Accounts, select an account to edit, and click Profile. To access the Profile page in classic UI, click Navigator, click Customers, select a customer, and click Profile on the Customer Information tree.
Oracle Sales Cloud has both a graphical chart view and a table view for account hierarchies. You can click the view icons located in the upper right of the Create Hierarchy page to alternate between views. The following tables describes chart and table views:

<table>
<thead>
<tr>
<th>Chart View</th>
<th>Table View</th>
</tr>
</thead>
<tbody>
<tr>
<td>See the hierarchy and the current active hierarchy version.</td>
<td>See the hierarchy and the current active hierarchy version.</td>
</tr>
<tr>
<td>Use the Control Panel tools to change the hierarchy layout, move the hierarchy around, center the hierarchy in the view, and increase or decrease the amount of zoom.</td>
<td>See the transactions associated with each node in the hierarchy. The transaction details region shows a list of associated contacts, open opportunities, open leads, team members, and assets.</td>
</tr>
<tr>
<td>Use the scroll arrows to see the following customer information:</td>
<td>Add or remove a node from the hierarchy (with the exception of the currently selected account).</td>
</tr>
<tr>
<td>• Number of open opportunities</td>
<td></td>
</tr>
<tr>
<td>• Number of won opportunities</td>
<td></td>
</tr>
<tr>
<td>• Number of leads</td>
<td></td>
</tr>
<tr>
<td>• Number of contacts</td>
<td></td>
</tr>
<tr>
<td>• Number of team members</td>
<td></td>
</tr>
<tr>
<td>• Number of assets (value)</td>
<td></td>
</tr>
<tr>
<td>• Customer type</td>
<td></td>
</tr>
<tr>
<td>• Industry for the account</td>
<td></td>
</tr>
<tr>
<td>• Primary contact information</td>
<td></td>
</tr>
</tbody>
</table>

| Use the scroll arrows to see the following information for prospects:     | Add an account to the hierarchy. You can add only one account to a given account hierarchy. |
|                                                                           |                                                                           |
| • Customer type                                                          |                                                                           |
| • Industry for the account                                               |                                                                           |
| • Primary contact information                                            |                                                                           |

Adding a Parent Account

Adding a parent account creates a parent-to-child hierarchy between the two accounts. Use the following steps to add a parent account to a selected account:

1. Click Accounts, and select an account to edit from the list.
2. On the Edit Account page, click the Profile tab.
3. Click the Search icon next to the Parent Account field.
4. On the Select Parent Account page, search for and select the account that you want to add as a parent.
5. Click OK.
You return to the Profile page and the selected account appears in the Parent Account field.

## Creating an Account Hierarchy

Use the following steps to create a hierarchy for your selected account:

1. Click Accounts, and select an account to edit from the list.
2. On the Edit Account page, click the Profile tab.
3. Under the Parent Account field, click the Create Account Hierarchy link.

![Note:](image) If the selected account is already part of a hierarchy, then you see a Manage Account Hierarchy link instead.

The Create Hierarchy page appears, displaying the selected account in chart view. You can use the view icons to switch between Chart and Table views.

4. From the Action menu, select Add Child.
5. Search for and select the child account you want to add.
6. Continue adding accounts to your hierarchy.
7. Click OK, then click Save and Close to save your changes and return to the Profile page for the selected account.

## Can I delete accounts that belong to a hierarchy?

You cannot delete an account if it is the ultimate parent (the root node) in an account hierarchy. However, you can remove the account as the ultimate parent in the hierarchy and then delete the account. To do so, you must first delete the sub accounts before deleting the ultimate parent account.

If the account is in the middle of an account hierarchy or the account is the lowest subsidiary (the leaf node) in the hierarchy, you can delete the account. The deleted account is no longer shown in the account hierarchy. The deleted account's sub accounts, if any, become separate hierarchies.

## Managing Account Contacts: Explained

When creating an account, you can select a contact as the primary contact. This contact is shown in the **Contacts** tab.

You can add or view the contacts in the following ways:

<table>
<thead>
<tr>
<th>View</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>List View</td>
<td>Shows the available contacts in a tabular format. Each line represents an account and the table structure represents the hierarchy. By default, the hierarchy shows all the parent levels and the immediate children of the account.</td>
</tr>
<tr>
<td>Diagrammer View</td>
<td>Shows the available contacts in a graphical view in a hierarchical format. You get a quick snapshot of how these contacts are related to each other in the organization. The node that represents the current account is highlighted. By default, the hierarchy shows the immediate parent and children of the account.</td>
</tr>
</tbody>
</table>
Manage Hierarchy

Viewing the account hierarchy enables you to see a complete picture of this account’s connections to other accounts.

Use the contact hierarchy to:

- Add a child account and subsequent child accounts and create a hierarchy
- Remove a child account
- Remove a parent account

Assigning Primary and Nonprimary Classifications: Explained

As a sales administrator, you have the ability to configure account assignment to enable primary and nonprimary industry codes, organization types, and classification values.

Enabling Organization Type and Industry Classification Values for Account Assignment

To enable Organization Type and Industry Classification Values:

1. Sign in as a sales administrator or a setup user.
2. Navigate to Setup and Maintenance and search for the Manage Customer Center Assignment Object task.
3. Click the Go to Task icon.
   The Manage Customer Center Assignment Objects page appears.
4. Select the Account object.
5. In the Account: Details region, select the Candidates tab and then select Account Territory.
7. In the Mappings region, select the work project.
8. Click Edit and edit the mappings as per your business requirement.
9. Click Save and Publish to activate the mapping to enable assignment by all classification values.

Managing Account Team Territories

Account Territory Member Access: Explained

Access for the Territory owners and members parallels that of the team members.

These access levels control the internal and partner territory privileges for the account:

- Internal territory owner: Full access
- Internal territory members (nonowner): Edit access
- Partner territory owner and members: View-only access

Note: You must implement Territory Management before you can access territory owners.

Related Topics

- When are territories assigned to accounts?
Account Team Member Access Levels: Explained

Access levels control the team member’s privileges for the account.

There are three types of account team membership access levels:

- View Only
- Edit
- Full

When you add a resource to the account team, a profile option setting determines the member’s default access level. If that member is removed from the account team, she no longer has access to the account, unless she is still a member of a territory that is assigned to the account. Resources in the management hierarchy of a newly added team member inherit the same access level of the subordinates.

View Only

View Only is the minimum level you can assign to team members. Team members with View Only access can view details of the account, such as: account team, snapshot, assessments, discussion forums, notes, and activities. If the team member’s resource role does not provide functional access to view a particular child attribute of an account, that member cannot view the attribute, regardless of her account team access level. The data security inherent on Sales Cloud business objects, such as leads and opportunities, determines whether or not a sales team member can view details of that business object.

Edit

Team members with the Edit access can view and edit all customer-related objects. The data security inherent on Sales Cloud business objects, such as leads and opportunities, determines whether or not a sales team member can view details of that business object. They can also run the territory reassignment process, but they cannot change the composition of the account team.

Full

With Full access, team members can do everything that Edit access allows, as well as changing the composition of the account team. Team members with Full access can manually add and remove other team members, change a member’s access level, and mark the lock assignment setting for team members. Initially, only the account owner and sales administrators have Full access, but they can grant Full access to other team members.

✏️ Note: Team members must have Full Access to edit Account Profile and Household Profile pages.

What are favorite accounts?

Accounts that you want to focus on because of business or other reasons. Tag accounts as favorites when creating or updating accounts, or when viewing the account list. Optionally, create a saved search based on your favorite accounts.

Managing Contacts Information
Sales Contacts: Explained

Any person can be a contact and that person does not need to be related to a customer.

Creating Contacts

You can create contacts in the following ways:

- Create directly in Oracle Sales Cloud
- Import contacts using file-based import
- Use web service to create a contact

Note: If Oracle Sales Cloud is integrated with Microsoft Outlook and IBM Notes, then you can also create contacts using these applications.

When you create a contact, existing contacts are checked for duplicate entries. If there is a match, you can select from the duplicate or continue creating the new contact. You can also search for relationships and edit them.

When you create or update a contact, the address field is not mandatory by default. Depending on the country that you choose, some fields are made mandatory. For example, if you select United States, then you must enter Address Line.

Managing Contacts

Use contact management capabilities to search for, create, update, delete, merge, and enrich contacts.

Contacts Overview presents you with the following information:

<table>
<thead>
<tr>
<th>Contact Tabs</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>Provides a general overview of the contact, open opportunities, quotes, open leads, active contracts, assets and recommendations, and activities.</td>
</tr>
<tr>
<td>Profile</td>
<td>Gives a complete picture of the contact including all the customer relationships and associated with the contact.</td>
</tr>
</tbody>
</table>

When a customer has multiple contacts, you can designate which contact is the primary contact from the customer’s profile page. This designation means that the selected contact is the primary means of communication to the customer. You can also include a picture of the contact in the Additional Details region.

Here you can also:

- Add account
- Update and verify address
- Mark as favorite contact

Team

Enables you to view and add team members. For a B2C account, you can also see and add territories.

You can manually run territory assignment for the contact through the Run Assignment process. The assignment action is enabled for the type of contact enabled for assignment.

Assets

Shows a list of assets for the contact.
### Contact Tabs

<table>
<thead>
<tr>
<th>Contact Tabs</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contracts</td>
<td>If your administrator has enabled this view, then you can view contracts associated with the contact. Depending on your access, you can also preview the contract in a PDF format.</td>
</tr>
<tr>
<td>Opportunities</td>
<td>Enables you to add and view opportunities for the contact.</td>
</tr>
<tr>
<td>Leads</td>
<td>Enables you to add and view leads for the contact.</td>
</tr>
</tbody>
</table>
| Relationships| Enables you to add account relationships to other account or contacts that are not directly related to the account but are influential. You can add the same contact to multiple accounts using different relationships. Review the relationships in the following views:  
- List view  
- Diagrammer view  
You cannot edit a role after you have added a relationship. To update the role, delete the existing relationship and create another relationship with the wanted role. |
| Notes        | Enables you to add and view notes for the contact. |
| Assessments  | Enables you to add and view assessments for the contact. |
| Activities   | Enables to add and view appointments, tasks, and call logs. |

**Related Topics**
- How can I designate a contact as primary?
- Oracle Sales Cloud - Understanding File-Based Data Import and Export

---

### Manage Contact Preference Information: Explained

Managing contact preference information includes creating and editing preferences about contact permissions and restrictions.

You can manage contact preferences on the customer’s Edit Contacts page in the classic interface by expanding the Contact Points region of the customer’s contact and selecting Manage Contact Preferences from the regional Action menu.

#### Creating Contact Preference Information

When you are viewing Address or Contact Point information for a customer or contact, you can select a specific address or contact point, and choose Manage Contact Preferences from the Action menu. You capture whether there is a restriction (Do not) or permission (Do) in the Preference attribute, and a Reason Code for such preference. You record a specific start date and can set an end date for the preference. As preconfigured, the start date is the current date, and the end date is null.
Reviewing Contact Preference Information
On seeing the Do Not Contact icon, you must review contact preference information for restrictions before taking any action. You can review the contact restriction information by clicking on the Do Not Contact icon or on the appropriate option from the action menu. Note that do-not-contact entries are made against each phone, e-mail, and address and not at the organization or person level. If restrictions are present for a phone number, the CTI action is disabled.

Privileges Required for Managing Contact Restriction Information
Contact restriction information, such as opting in or out of the Public Do Not Call Registry, is captured as a Reason Code. Regular business users, such as salespeople and managers, can create and edit contact preference information with any Reason Code that is not identified as Legal. However, to be able to create and edit contact restriction information using a Reason Code that is tagged as Legal, you must add the HZ_LEGAL_CONTACT_PREFERENCES_PRIV privilege to the required role.

A Reason Code can be setup as Legal by tagging the Reason Code lookup value in the lookup type REASON_CODE with the value LEGAL using Manage Trading Community Common Lookups task.

Managing Households Information

Sales Households: Explained
A household is a group of contacts generally sharing a common link or association.
Households provide valuable segmentation information about the household as a whole, as well as summary of information about the household member contacts. Usually all the contacts reside at the same address and have a similar set of entities that accounts do, such as team members, territories, and contacts.

Creating Households
You can create households in the following ways:
- Create directly in Oracle Sales Cloud
- Import households using file-based bulk import
- Create households using Web Services

Managing Households
Use household management capabilities to search for, create, update, and delete households.
Households Overview presents you with the following information:

<table>
<thead>
<tr>
<th>Household Tabs</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overview</td>
<td>Provides a general overview of the household, opportunities, active contracts, open leads, products, and activities.</td>
</tr>
<tr>
<td>Profile</td>
<td>Provides household-related details such as address and contacts.</td>
</tr>
</tbody>
</table>
## Household Tabs

<table>
<thead>
<tr>
<th>Household Tabs</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Here you can also:</td>
</tr>
</tbody>
</table>
|                | • Assign head of the household  
|                | • Update and verify household address |
| Team           | Shows team members and territories that are part of the household. Here you can also: |
|                | • Add team members  
|                | • Add partner territories  
| Note:         | You can manually run territory assignment for the household through the Run Assignment process. The assignment action is enabled for the type of household enabled for assignment. |
| Assets         | Enables you to add and view assets for the household. |
| Opportunities  | Enables you to add and view opportunities for the household. |
| Leads          | Enables you to add and view leads for the household. |
| Relationships  | Enables you to add relationships to other households or contacts that are not directly related to the household but are influential. Review the relationships in the following views: |
|                | • List view  
|                | • Diagrammer view |
| Notes          | Enables you to add and view notes for the household. |
| Assessments    | Enables you to add and view assessments for the household. |
| Activities     | Enables to add and view appointments, tasks, and call logs. |
| Contracts      | If your administrator has enabled this view, then you can view contracts associated with the household.  
|                | If you have the appropriate access, then you can also preview the contract in a PDF format. |

### Related Topics

- What happens when I delete a household?
- Oracle Sales Cloud - Understanding File-Based Data Import and Export
Household Relationships: Explained

Relationships can be household contacts, such as parent, spouse, or child. Relationships can also be of other types, for example a bank that has a financial dealing with the contact and so on. The other relationships can be of type person, group, or organization.

The Relationships tab includes:

- Contacts: household members as the immediate beneficiaries.
- Other relationships: other relationships of type person, group, or organization.

Note: If you have selected a primary contact, then it is included as a household contact, by default.

Review relationships in the following views:

- List view: This view shows the available relationships in a tabular format.
- Diagrammer view: This view shows network visualization of the relationships. The visualization can show up to four levels of connections. By default, the connections are shown up to the second level.

Your administrator must enable this view.

List View

The list view is the default view. It contains two tables; Household Contacts and Other Relationships.

The list view table displays household members who are your immediate beneficiaries. The other relationships table shows other relationship that may not be your direct beneficiary. By default, both the tables are sorted by name.

Diagrammer View

Diagrammer shows a graphical representation of the contacts and other relationships that the household has.

The visualization can display up to four levels of connections. By default, the connections are shown up to the second level. Each node in the graph represents an account or a household and each link between nodes represents a connection between them.

Enabling or Viewing Relationships in a Household: Explained

This topic covers how you enable or view relationships among the contacts in a household.

Use the Relationships subtab to view the hierarchy of the contacts related to the household that you are editing. You can view the relationships in tabular (list) or diagrammatic (graphical) format.

You must first enable these views using Application Composer.

Enabling Relationship Views

You can show or hide panels or regions in Households UI for viewing relationships.
To show or hide the views:

1. Navigate to Application Composer.
2. Select Common from the Application list.
3. Expand Households under Standard objects.
4. Click Pages and select the Simplified Pages tab.
5. Click Details Page Layout.
   Either edit the default layout or create a duplicate layout and then edit it.
7. Show or Hide the following:
   - Relationship Diagram Panel
     This panel shows the graphical representation of the relationships in a household.
   - Household Contacts:
     Provides a list view of the contacts in a tabular format.
   - Other Relationships:
     Any other relationship appears in this section.
8. Click Done

Accounts, Contacts, and Households Searches

Managing Contact Saved Search Lists: Explained

This topic explains how to manage your contact saved search lists in the Contacts page.

You can't edit or delete the pre-configured saved lists or any custom lists added by your administrator. You can customize these saved searches to match your requirements, and then create a new saved search.

The Contacts page includes four predefined saved searches that let you filter the contacts you view in the page:

- My Contacts: Displays all contacts, of the type sales account, that you are an owner of.
- My Favorite Contacts: Displays all your favorite contacts.
- My Team and Territory Contacts: Displays all contacts, of the type sales account, where you are on the account team member or you are on the account territory resources.
- My Business Contacts: Displays all contacts belonging to all the accounts you own.

Creating a Saved Search

Use the following steps to create a saved search:

1. From the List menu, select Create or Edit Lists.
2. In the Saved Searches window, use the filters to customize your search, and click Search.
3. Click Save.
4. In the Create Saved Search window, enter a name for the saved search.
5. Click OK.
What account records do the different record sets permit you to search?

The different record sets provided in the Saved Searches window restrict your saved searches to different sets of accounts. For example, the default My Accounts saved search, searches the Records I own record set, listing all of the accounts you created or were assigned to as an owner.

The following table lists and describes the record sets for accounts. Not all record sets are available to all users. For example, the record sets involving subordinates are available only to managers.

Tip: To improve saved search performance, restrict your saved searches to smaller record sets. For example, rather than searching all the records you can see, search all the records in your territory hierarchy. Or restrict your searches to a smaller geographical work area. For example, search all the accounts in one state instead of the whole country.

<table>
<thead>
<tr>
<th>Record Set Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Records I own</td>
<td>Accounts you own. You are the account owner if you created the account or if ownership was assigned to you.</td>
</tr>
<tr>
<td>I am on the team</td>
<td>Accounts where you are on the account team. You are on the account team if you are the account owner or were added as a member by another team member.</td>
</tr>
<tr>
<td>My territory</td>
<td>Accounts in your sales territories.</td>
</tr>
<tr>
<td>My subordinates own</td>
<td>Accounts owned by you and your subordinates.</td>
</tr>
<tr>
<td>My subordinates are on the team</td>
<td>Accounts where you or your subordinates are on the account team.</td>
</tr>
<tr>
<td>My territory hierarchy</td>
<td>Accounts in your sales territories and all of their subordinate territories in the sales territory hierarchy.</td>
</tr>
<tr>
<td>I am on the team or territory</td>
<td>Accounts where you are either on the account team or a member of the sales territory.</td>
</tr>
<tr>
<td>My subordinates are on the team or territory</td>
<td>Accounts where you or your subordinates are either on the account team or the sales territory.</td>
</tr>
<tr>
<td>All records I can see</td>
<td>Accounts that you can view based on your account team membership, sales territory assignments, your position in the organization, and security permissions.</td>
</tr>
</tbody>
</table>
What contact records do the different records sets permit you to search?

The different record sets provided in the Saved Searches window restrict your saved searches to different sets of contacts. For example, the default **My Contacts** saved search, searches the **Records I own** record set, listing all of the contacts you created or were assigned to as an owner.

The following table lists and describes the record sets for contacts. Not all record sets are available to all users. For example, some record sets are available only if you sell to consumers. Record sets involving subordinates are available only to managers.

<table>
<thead>
<tr>
<th>Record Set Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Records I own</td>
<td>Contacts you own. You are the contact owner if you created the contact or if ownership was assigned to you.</td>
</tr>
<tr>
<td>Records where I am on the team</td>
<td>Contacts where you are on the contact team. You are on the contact team if you are the contact owner or were added as a member by another team member.</td>
</tr>
<tr>
<td>Records my subordinates own</td>
<td>Contacts owned by you and your subordinates.</td>
</tr>
<tr>
<td>Records where my subordinates are on the team</td>
<td>Contacts where you or your subordinates are on the contact team.</td>
</tr>
<tr>
<td>All records I can see</td>
<td>Contacts that you can view based on your contact team membership, sales territory assignments, your position in the organization, and security permissions.</td>
</tr>
<tr>
<td>Records in accounts I own</td>
<td>Contacts in the accounts you own. You are the account owner if you created the account or ownership was assigned to you.</td>
</tr>
<tr>
<td>Records in accounts where I am on the account team or territory</td>
<td>Contacts in the accounts where you are on the account team or sales territory.</td>
</tr>
<tr>
<td>Records in my territory</td>
<td>Contacts in your sales territories.</td>
</tr>
<tr>
<td>Records in my territory hierarchy</td>
<td>Contacts in your sales territories and all of their subordinate territories in the sales territory hierarchy.</td>
</tr>
<tr>
<td>Records where I am on the team or territory</td>
<td>Contacts where you are either on the contact team or the sales territory.</td>
</tr>
<tr>
<td>Records where my subordinates are on the team or territory</td>
<td>Contacts where you or your subordinates are either on the contact team or the sales territory.</td>
</tr>
</tbody>
</table>
What household records do the different record sets permit you to search?

The different record sets provided in the Records field of the Saved Searches window restrict your saved searches to different sets of households. For example, the default My Households saved search, searches the I own record set, listing all of the households you created or were assigned to as an owner.

The following table lists and describes the record sets for households. Not all record sets are available to all users. For example, the record sets involving subordinates are available only to managers.

Tip: To improve saved search performance, restrict your saved searches to smaller record sets. For example, rather than searching all the records you can see, search all the records in your territory hierarchy. Or restrict your searches to a smaller geographical area. For example, search all the households in one state instead of the whole country.

<table>
<thead>
<tr>
<th>Record Set Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I own</td>
<td>Households you own. You are the household owner if you created the household or if ownership was assigned to you.</td>
</tr>
<tr>
<td>I am on the team</td>
<td>Households where you are on the household team. You are on the household team if you are the household owner or were added as a member by another team member.</td>
</tr>
<tr>
<td>My territory</td>
<td>Households in your sales territories.</td>
</tr>
<tr>
<td>My subordinates own</td>
<td>Households owned by you and your subordinates.</td>
</tr>
<tr>
<td>My subordinates are on the team</td>
<td>Households where you or your subordinates are on the household team.</td>
</tr>
<tr>
<td>My territory hierarchy</td>
<td>Households in your sales territories and all of their subordinate territories in the sales territory hierarchy.</td>
</tr>
<tr>
<td>I am on the team or territory</td>
<td>Households where you are either on the household team or a member of the sales territory.</td>
</tr>
<tr>
<td>My subordinates are on the team or territory</td>
<td>Households where you or your subordinates are either on the household team or the sales territory.</td>
</tr>
<tr>
<td>All records I can see</td>
<td>Households that you can view based on your household team membership, sales territory assignments, your position in the organization, and security permissions.</td>
</tr>
</tbody>
</table>

Merging Information
How can I make merge requests?

You can create a merge request when you have duplicate records pointing to the same customer, and you want to consolidate those records into one. An approved merge request results in one surviving record. The status of all other duplicate records changes to Merged. You can select to merge two or more customer records from the customer list on your Customer home page or in the customer search results.

Since the Oracle Sales Cloud Customer Data Hub processes all merge requests, you must implement Customer Data Hub and set the profile option Merge Request Enabled to YES to make this feature available.

Can I specify multiple accounts or contacts that I want to merge?

Yes. You can select and submit a request to merge multiple accounts or contacts into a single surviving record.

Use the landing page for accounts or contacts to submit a merge request.

Enriching Accounts and Contacts

Account and Contact Enrichment: Overview

A key requirement for a customer lifecycle management application is to keep your account and contact data clean, accurate, relevant, and easily accessible.

Oracle Data and Insight Cloud Service (Data Cloud Service) is a service on the Oracle Cloud that provides rich data and insights about common business entities such as businesses, people, and products. This information comes from commercial data sources such as Dun & Bradstreet.

You can use Oracle Data Cloud Service to enrich:

- Individual Oracle Sales Cloud accounts and contacts.
- A list of your Oracle Sales Cloud accounts and contacts.
- New contacts for an Oracle Sales Cloud account as you import them into the account.

Enriching an Individual Account or Contact

You can enrich an individual account or contact (that is associated to an account) from within Oracle Sales Cloud. You enrich an account or contact from the Action menu on the account or contact profile page.

When you enrich a single account or contact, you see a list of attributes available for that record with side-by-side values for both the Oracle Sales Cloud and the Oracle Data Cloud Service.

As pre-configured, the following attributes are available for accounts:

- Company Name (Not Sales Account Name)
- Current Fiscal Year Potential Revenue
- Primary Street Address
• Duns Number C
• Line Of Business
• Public Private Ownership Flag
• Stock Symbol
• Year Established
• Location Type (HQ or Branch)
• Primary Address1
• Primary Address2
• Primary City
• Primary County
• Primary State
• Primary Postal Code
• Primary Postal Plus4 Code
• Mailing Address1
• Mailing Address2
• Mailing City
• Mailing State
• Mailing Postal Code
• Mailing Postal Plus4 Code
• Phone
• Fax
• URL
• Trade Style Name
• Major Industry
• NACIS Classification
• SIC Classification

As pre-configured, the following attributes are available for contacts:

• Prefix
• First Name
• Middle Name
• Last Name
• Job Title
• Gender
• Suffix
• Work Street Address1
• Work City
• Work State
• Work Postal Code
• Work Postal Plus 4 Code
• Work Country
• Contact Work Phone
• Contact Phone Extension
• Email Address
• Department

You can accept all attribute values from Data Cloud or choose the ones you want. The account or contact information updates with the selected information.

Enriching Multiple Accounts or Contacts
You can enrich multiple accounts or contacts (that are associated to accounts) from within Oracle Sales Cloud. You enrich accounts or contacts from the Action menu on your Account or Contact list page.

Instead of seeing the page showing the attribute value comparison between Sales Cloud and Data Cloud when you select multiple accounts or contacts for enrichment, you see an indicator showing enrichment progress.

As you enrich multiple accounts or contacts, you can’t select which attributes to enrich like you do when you enrich a single account or contact. However, administrators can use the Manage Social Data and Insight Cloud Attribute Mapping and Preferences task to determine which attributes to enrich.

After completion, review the enrichment summary report for details about:
• Records Selected
• Records Enriched
• Record with Multiple matches
• Records with no Match
• Records Failed

**Note:** When you enrich a large number of accounts or contacts, the enrichment process can place a heavy load on your environment. Therefore, limits may be set on the number of accounts or contacts you can enrich at one time.

Adding Enriched Contacts to an Account
You can add new contacts from Oracle Data Cloud Service to a previously enriched account in Oracle Sales Cloud. You add these new contacts by either clicking Get Contacts or selecting Get Contacts from the Action menu on the Contacts tab.

When you choose Get Contacts, you see a list of contacts available for download from the Data Cloud. You can choose to see these contacts grouped by job level or by location and you can choose to add the contacts by level, by location, or by both.

Enriching Sales Cloud Automatically: Overview
You can enrich sales cloud data automatically using the Oracle Social Data and Insight Cloud service. Before you can enrich data, you must first purchase a third-party data service subscription and your administrator must create a new user with the **Data Service Client API ApplID** role. This user is used by Oracle Sales Cloud to securely communicate with the Oracle Social Data and Insight REST APIs.
Before you start enriching sales cloud data, you must:

- Set up Sales Cloud and Data Cloud integration
- Set up automatic enrichment preferences and administrator profile options.

After setting up the enrichment and integration preferences, you can enrich an account or contact from the Accounts or Contacts pages.

**Enriching Accounts and Contacts: Procedure**

You can use Oracle Data Cloud and Insight service to enrich an account or contact profile with the latest information available from outside sources, such as Dun & Bradstreet (D&B).

**Enriching an Account**

Follow the steps below to enrich an account:

1. From your Accounts list, select the account you want to enrich.
2. On the Overview page for the selected account, select Enrich Account from the Action menu.
3. On the Select Fields to Enrich dialog box, select the data cloud values you want to add to the account, and click Enrich.

You see a confirmation message stating that the enrichment was successful, and you return to the account Overview page, which reflects the enriched information for the account. The available social media handles, in the account, are added or updated.

**Enriching a Contact**

Follow the steps below to enrich your contact:

1. From your Contacts list, select the contact you want to enrich.
2. On the Overview page for the selected contact, select Enrich Contact from the Action menu.
3. On the Select Fields to Enrich dialog box, select the data cloud values you want to add to the contact, and click Enrich.

You see a confirmation message stating that the enrichment was successful, and you return to the contact Overview page, which reflects the enriched information for the contact. The social media handles, in the contact, are added or updated.

**Enriching Account Lists and Contact Lists: Procedure**

You can use Oracle Data Cloud and Insight service (Oracle Data Cloud) to enrich your account list and contact list with the latest information available from outside sources, such as Dun & Bradstreet (D&B).

**Enriching Your Account List**

Follow the steps below to enrich your account list:

1. From your Accounts list, select the accounts you want to enrich.
2. From the Action menu, select Enrich Selected Accounts.
3. On the Select Fields to Enrich dialog box, select the data cloud values you want to add to the accounts, and click Enrich.

You see an Enrichment Results page listing the selected accounts and the enrichment status of each.
If the enrichment was successful, you return to your Accounts list page and the additional information now appears for the selected accounts. The available social media handles, in the accounts, are added or updated.

**Enriching Your Contact List**

Follow the steps below to enrich your contact list:

1. From your Contacts list, select the contacts you want to enrich.
2. From the Action menu, select Enrich Selected Contacts.
3. On the Select Fields to Enrich dialog box, select the data cloud values you want to add to the contacts, and click Enrich.

You see an Enrichment Results page listing the selected contacts and the enrichment status of each.

If the enrichment was successful, you return to your Contacts list page and the additional information now appears for the selected contacts. The available social media handles, in the contacts, are added or updated.

**Enriching Account and Account Contact Data Manually: Explained**

You could manually enrich account and account contact data using the Oracle Social Data and Insight Cloud service.

To manually enrich account and account contact data:

1. Export the data you want to enrich from Oracle Sales Cloud to a CSV file.
2. Enrich the exported data using the Oracle Social Data and Insight Cloud service.
3. Download the enriched data file from Oracle Social Data and Insight Cloud service.
4. Import the enriched data file into Oracle Sales Cloud.

**Exporting Data from Oracle Sales Cloud**

You export account or account contact data from Oracle Sales Cloud using the Schedule Export Processes task. The export process provides two predefined objects, one each for exporting account and account contact data. While exporting data, select the Organization for Data Cloud Enrichment object to export account data and the Person for Data Cloud Enrichment object to export account contact data.

**Enriching Data in the Oracle Social Data and Insight Cloud Service**

You can manually enrich account or account contact data using the Enrich Data functionality of the Oracle Social Data and Insight Cloud service.

To enrich data, select the CSV file exported from Oracle Sales Cloud in the Enrich Data Records page of the Oracle Social Data and Insight Cloud service. You must select the CRM template during enrichment, so that the enriched file can be later downloaded in Oracle Sales Cloud. After enrichment is complete, a CSV file with the enriched data is available for download from the Jobs list.

For more information about Oracle Social Data and Insight Cloud service, see Using Oracle Social Data and Insight Cloud Service guide.

**Importing Enriched Data into Oracle Sales Cloud**

You must import the CSV file generated in the Oracle Social Data and Insight Cloud service into Oracle Sales Cloud using the file-based import functionality to import the enriched account or account contact data.

To import data into Oracle Sales Cloud using file-based import:

1. Create an import activity.
2. Enter the appropriate import details. While specifying the import object, select the **Account** to import account data and the **Contact** to import account contact data.

3. Provide the file mapping. Mapping defines the mapping between the columns provided in a source file and object attributes in the import file. Oracle Sales Cloud provides seeded mappings to import account data or account contact data from Oracle Social Data and Insight Cloud service. You must select **Seeded Data** to view the available seeded mappings. While specifying the import mapping, select **Data Cloud Account Import** mapping to import account data and **Data Cloud Contact Import** mapping to import account contact data. Oracle Sales Cloud then automatically maps the data in the CSV file to object attributes.

4. Schedule the import process.

> **Note:** In some cases, the import activity may display a warning about source and target attributes. You can ignore the warning message and click OK to submit the import process.

---

### Enriching Account and Account Contact Data Automatically: Procedure

This topic illustrates how you can enrich account and account contact data automatically from Sales Cloud, using Oracle Social Data and Insight Cloud Service. Oracle Social Data and Insight Cloud Service includes authenticated D&B records of companies and contacts. You can use the service to authenticate and enrich account and contact data from Sales Cloud.

#### Enrich Account Data Automatically

You enrich account data from the Accounts page of the simplified UI.

To enrich account data:

1. In the Account page of the simplified UI, select the accounts you want to enrich.
2. Select **Enrich Selected Account** from the Actions menu.
   
   If you select multiple accounts for enrichment, Sales Cloud automatically enriches the accounts and displays the results. The result includes information about the accounts enriched and the status of each account.
   
   If you select one account for enrichment, the Select Fields to Enrich page is displayed. In the page, you can select what data values you would like use in the enriched account record for each of the fields.
3. For each of the field, select if you want to use existing value or the Data Cloud value.
4. Optionally, click on **Hide Identical Fields** to hide the fields where the Sales Cloud data is same as the Data Cloud data.
5. Click **Enrich**.

#### Enrich Account Contact Data Automatically

You enrich account contact data from the Contacts page of the simplified UI.

To enrich contact data:

1. In the Contacts page of the simplified UI, select the contacts you want to enrich.
2. Select **Enrich Selected Contacts** from the Actions menu.
   
   If you select multiple contacts for enrichment, Sales Cloud automatically enriches the contacts and displays the results. The result includes information about the contacts enriched and the status of each contact.
If you select one contact for enrichment, the Select Fields to Enrich page is displayed. In the page, you can select what data values you would like use in the enriched contact record for each of the fields.

3. For each of the field, select if want to use the existing value or the Data Cloud value.
4. Optionally, click on **Hide Identical Fields** to hide the fields where the Sales Cloud data is same as the Data Cloud data.
5. Click **Enrich**.

### Managing Assets

#### How can I create account, contact, and household assets?

You can create account, contact, and household assets if you have one of the following job duties, unless the duty roles have been customized:

- Sales Party Management Duty
- Marketing Sales Party Management Duty

To create assets for accounts, contacts, or households:

1. Navigate to the Assets tab of the account, contact, or household.
2. Click Create Asset
3. Provide information about the asset.
4. Click Save and Close.

The new asset appears on the account, contact, or household tab or the Assets landing page depending on where you created the asset.

#### How can I view account, contact, and household assets?

You can view account, contact, and household assets if you have one of the following job duties, unless the duty roles have been customized:

- Sales Party Review Duty
- Sales Party Management Duty
- Marketing Sales Party Management Duty

To see the assets list view for an account, contact, or household from the Overview page:

1. Navigate to the account, contact, or household.
2. On the account, contact, or household Overview page, click the number listed under Product.

To see the assets list view for an account, contact, or household from the Edit page:

1. Navigate to the account, contact, or household.
2. In the Edit view for the account, contact, or household, click the Assets tab and click Edit.
3. In the View Assets interface, you can select to see All Assets, Active Assets, or Inactive Assets from the list view.

> **Note:** The default list view is Active Assets.
How can I edit account, contact, and household assets?

You can edit account, contact, and household assets if you have one of the following job duties, unless the duty roles have been customized:

- Sales Party Management Duty
- Marketing Sales Party Management Duty

To edit assets for accounts, contacts, or households:

1. Navigate to the Assets tab of the account, contact, or household.
2. Select the asset to go to the Asset Summary page in Edit mode.
3. In the Edit Asset page, edit the asset information as needed.
4. Click Save and Close.

How can I delete account, contact, and household assets?

You can delete account, contact, and household assets if you have one of the following job duties, unless the duty roles have been customized:

- Sales Party Management Duty
- Marketing Sales Party Management Duty

To delete assets from accounts, contacts, or households:

1. Navigate to the Assets tab of the account, contact, or household.
2. Select the asset to go to the Asset Summary page in Edit mode.
3. In the Edit Assets page, click Delete Assets from the Actions menu.
   The asset is no longer displayed in the Assets List view, in the account, contact, or household.

⚠️ Note: When you delete an asset, only the association with the parent object is deleted. The asset still exists in the application.

Duplicate Accounts and Contacts: Overview

You can now resolve a duplicate record issue, in Oracle Sales Cloud, and ensure that a clean customer profile is available to salespeople.

Clean and consistent customer data is important to an organization. Multiple salespeople create and update accounts and contacts that can potentially create an ecosystem of duplicate accounts and contacts in your application. You can now filter duplicate accounts and contacts. If data quality is enabled by your administrator, then the application checks for possible duplicate accounts and contacts when you create them.

When you create an account or a contact, the application searches for duplicate accounts or contacts based on these conditions:

- data quality configuration for accounts and contacts
• exact name match

If duplicate accounts or contacts are found, then they are presented to you in a list on the duplicate notification page. You can either ignore these duplicate accounts or contacts and continue creating the object or you can select an account or a contact from the list.

Managing Account, Contact, and Household Contracts: Explained

If your administrator has enabled this view, then you can view contracts associated to your account. If your administrator has granted the “Contract Search and View Access Duty” access to your role, then you can download a contract in PDF format. Click Preview Contract to view the contract in a PDF document format.

Deleting Accounts, Contacts, or Households

Deleting Accounts, Contacts, and Households: Explained

Sales administrators and other designated users can delete accounts, contacts, and households in Oracle Sales Cloud services.

The following tables lists and describes the privileges you must have to delete account, contacts, and households:

<table>
<thead>
<tr>
<th>Object</th>
<th>Privilege</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Delete Sales Party</td>
<td>You cannot delete an account if it is a partner, reference, or competitor account or the account is the topmost tier in the account hierarchy.</td>
</tr>
<tr>
<td>Contact</td>
<td>Delete Sales Party Contact</td>
<td>You can delete standalone contacts. You must also have full access to all of the accounts associated to the contact. When you delete a contact, you remove the entire person record of the contact, including profile data, account usages, household memberships, and relationships to other accounts.</td>
</tr>
<tr>
<td>Household</td>
<td>Delete Sales Party Duty</td>
<td>When you delete a household, you break the association between the household and all of its household members. However, you can still view the members as individual accounts or contacts.</td>
</tr>
</tbody>
</table>
What happens when I delete an account?

When you delete an account the entire record is removed from Oracle Sales Cloud.

In general, when you delete an account:

- The account party status becomes inactive. The account record is not physically deleted from the database.
- The deleted account does not appear in account list, account search, account picker, account data quality match, segmentation, and recent items.
- The deleted account’s profile and children, such as attachments and notes, can no longer be viewed.
- The account’s contact relationships, if any, are deleted. The contact can still be viewed, but deleted contact relationships will not be shown in the contact.
- Deleting an account does not cascade delete account related objects such as opportunities, leads and tasks. You can still view related objects and the account name on these objects, but you can no longer access the deleted account’s details.

Note: After you have deleted an account the application does not support restoring that account.

What happens when I delete a contact?

When you delete a contact the entire record is removed from Oracle Sales Cloud.

In general, when you delete a contact:

- The entire person record of the contact is removed from Oracle Sales Cloud, including all profile data, customer usages, group memberships.
- Relationships with associated customers or sales accounts are deleted.
- Contact points or other child objects specific to the customer-contact relationship will not be shown.
- A deleted contact will not be shown or available in any other contact or customer lists, regardless of the contact type (standalone, single, or multiple) customer-contact, or a consumer or prospect, or in cases where the contact is both a customer contact and a consumer or prospect.
- Even if you have the functional privilege to delete a contact, you cannot unless you have full or edit access to at least one of the accounts associated to the contact.

Note: After you have deleted a contact the application does not support restoring that contact.
Creating Sales Campaigns

Sales Campaigns: Overview

This topic provides an overview of sales campaigns. Sales representatives and sales managers can create sales campaigns for reaching out to contacts within their territories. Using sales campaigns, they invite contacts to an event or inform them about a product launch. Features of a sales campaign include:

- The ability to target contacts from multiple sources including the contact repository and previous campaigns.
- An easy-to-use guided process
- Access to e-mail templates
- A response gathering and monitoring capability
- The option to personalize e-mail for individual contacts
- The ability to schedule a campaign to launch on a specific date
- Automated follow-up for specific response types

To create sales campaigns, start from the Campaigns work area, which you can access from the Navigator by selecting Sales Campaigns under the Sales section.

Creating a Sales Campaign

Watch: This tutorial shows you how you can use Oracle Sales Cloud to easily create sales campaigns that send marketing e-mail correspondence to individual contacts of your customers.

Adding Contacts to Sales Campaigns

You can select a specific set of contacts to include in a sales campaign, or you can decide to include all contacts from a previously created sales campaign.

Note: The number of contacts to include in your sales campaign should not exceed 500.

From the Contacts subtab, you can search for contacts by Record Set, Name or Account. You can add additional search criteria fields by clicking the Add button. This action allows you to further segment and target specific contacts to include search criteria such as City, Country, Creation Date, Buying Role, and so on to further refine your search.

By selecting the Previous Campaigns subtab, you can select the campaign you want from the Campaign Name list. You can then select and apply the contacts to your campaign.

Select contacts for your sales campaign from the Contacts subtab as follows:

1. Sign in as a sales representative or a sales manager.
2. From the simplified UI, click Sales Campaigns to go to the Sales Campaigns work area.
3. Click Create Campaign.
4. Click **Add Contacts** to go to the **Add: Contacts** screen.
5. Click **Contacts** subtab and enter search criteria for contacts by **Record Set, Name** or **Account**, and click **Search**.
6. Click **Add** if you need to further refine your search for specific contacts.

   ✏️ Note: Click **Create Contact** if you want to create a new contact to add to your sales campaign.

7. Select the contacts you want from the search list and click **Apply** and then **OK**.

### Inserting Response Forms to Sales Campaigns

You can add forms to campaign content so that recipients can respond to your campaign. Sales campaigns have the capability to track responses and convert them to leads. You can add customer response forms to an e-mail template when creating a sales campaign.

For example, during the **Design E-Mail** step of the sales campaign process, you decide to insert one of the following response forms to your campaign:

- Forward To Friend
- Request Call Back
- Requested More Information

Insert a response form to your sales campaign as follows:

1. Sign in as a sales representative or a sales manager.
2. From the simplified UI, click **Sales Campaigns** to go to the Sales Campaigns work area.
3. Click **Create Campaign**.
4. Click **Add Contacts** to add the contacts you want to target for your sales campaign.
5. Go to the **Design E-Mail** step and select the template you want to use.
6. Place your cursor in the area of the template where you want to insert a response form link.
7. Click **Insert Elements** and from the **Show** field, select **Response Forms**.
8. Select the response form you want and click **Insert**. Repeat this step if you want to include another response form, and click **Done** when finished.

### Adding Follow-up Tasks to Sales Campaigns

You can associate follow-up tasks to customer response forms on an e-mail template when creating a sales campaign. For example, during the final **Wrap Up** step of the sales campaign process, you decide to associate one of the following tasks to the customer response forms you inserted from the Design E-Mail step:

- Create call back task
- Receive e-mail notification

Add a follow-up task for your customer response form as follows:

1. Sign in as a sales representative or a sales manager.
2. From the simplified UI, click **Sales Campaigns** to go to the Sales Campaigns work area.
3. Click **Create Campaign**.
4. Click **Add Contacts** to add the contacts you want to target for your campaign.
5. Go to the **Design E-Mail** step and select a template to use.
6. Select the response form you want, and click Insert. Repeat this step if you want to include another response form, and click Done when finished.

7. From the Wrap Up step, go to the My Follow-Up Actions, Customer Responses area.

8. From the Actions list, select the follow-up action you want to associate with each of the customer response forms you previously inserted in your e-mail template.

Sales Campaign Content: Explained

You can personalize your sales campaign by adding components such as images, merge fields and response forms. To create the content of your sales campaign, you can add any combination of the following:

- Images
- Merge fields
- Response forms
- Standard and ad hoc URLs
- Conditional content

Images
Add graphic images to your e-mail. You can provide a link to an image already on a server, or select a local file and upload it to the server. Specify the size and placement of the image. You can add a URL of a publicly hosted image using the \texttt{img src} tag.

Merge Fields
Personalize your e-mail message body by adding placeholders from a list of merge fields, such as the recipient’s first name. Merge fields are standard sets of attributes pertaining to an individual contact. You can insert them into your e-mail content. When you launch the campaign, merge fields are dynamically populated directly from the database. With sales campaigns you can also compose a personalized text message for each recipient. The personalized text feature is not available for multistage campaigns.

Response Forms
Insert response forms as active links in your e-mail campaign content. When a contact clicks one of the links, a specific response is automatically generated. All such responses are gathered and monitored, to track contacts’ actions. Available response forms for sales campaigns are:

- Forward to Friend
- Request Call Back
- Request More Information

Standard and Ad Hoc URLs
You can add any of the following types of URL:

- Standard URLs are predefined and commonly used across the enterprise.
- An ad hoc URL can be created when you define your e-mail content.
By default, all standard URLs are tracked automatically. You can optionally enable tracking for ad hoc URLs, or disable tracking for standard URLs. With tracking enabled, every time a contact clicks a link in a campaign e-mail, the click is recorded as a specific response, together with details pertaining to the URL.

**Conditional Content**

Conditional content is inserted or omitted based on the results of a rule. There are two elements that you can use to generate conditional content within an e-mail:

- **If-Then-Else cases** are used to determine if a block of text or HTML is removed from an outgoing e-mail, by verifying if a merge field value is defined. The merge field is defined if it is not an empty string or, for numeric merge fields, if it is not a value of 0 (zero). If the merge field is defined, the block of text or HTML remains in the outgoing e-mail. If the merge field is not defined, the block of text or HTML is removed from the outgoing e-mail.

- **Named Blocks** are used to decide whether or not to insert a block of text or HTML into an outgoing e-mail, by comparing one string to another. If the two strings are identical, the block is inserted.

**Related Topics**

- Using Conditional Content in Sales Campaign Templates: Explained

**Adding Personalized Text in an E-Mail Campaign: Example**

You are creating an e-mail campaign inviting contacts to an event that your company will host next month. You already have a template that provides most of the information.

In addition to standard merge fields that will automatically populate contact data, you want to add a more personal touch, for a selected few contacts, to the otherwise generic e-mail content.

**Adding Personalized Text**

1. Create a campaign, enter the details, select all the contacts for the campaign (not just the ones to whom you will send a personalized message) and, optionally, choose a template.

2. When you edit the e-mail content, add the personalized text merge field where you want the personalized text to appear.

3. When you enter advanced options, locate the contact for whom you want to create a personal text in the list of contacts. Click the edit icon in the Personalize column to open a new HTML editor window where you can enter a message for the selected contact. You can apply styles just as in the common area of the e-mail. You can preview and edit the personal message until you have what you want. You can repeat this step to create individual personal messages for as many contacts as you choose.

**Follow-Up Actions: How They Work**

When you create a sales campaign, you may want to be notified automatically when a targeted contact responds in a specific way. You can associate follow-up actions with specific responses, so that the follow-up action is triggered automatically when a contact responds to your campaign e-mail.
Response Form
You can include response forms in the content of your campaign. These appear to recipients as hyperlinks that they can click within the e-mail. Every click is recorded, and used to track usage statistics. In addition, each response can also trigger an associated action to be performed automatically.

Follow-up Action
Follow-up actions are predefined actions that can be triggered by contacts' responses. The purpose of these actions is to inform you, the creator of the campaign, when a particular contact clicks a specific response. You can choose to receive this information in an e-mail notification that will appear in your e-mail, or by the creation of a task that will appear in your worklist. In either case, the information you receive includes campaign details, contact details, the specific response that the contact clicked, and the date and time of that click.

FAQs for Creating Sales Campaigns

What is the recommended limit of contacts to include in a sales campaign?
The number of contacts to include in your sales campaign should not exceed 500. Oracle recommends to create a new sales campaigns if you want to add more contacts beyond the recommended specification.

What sales campaigns display when I select the My Draft Campaigns and the My Completed Campaigns lists?
When you select the My Draft Campaigns list in the Sales Campaigns work area, the application displays a list of all of the campaigns you own that are pending activation. Selecting the My Completed Campaigns list displays all sales campaigns you own that have been completed within the last three months.

What campaign records do the different record sets permit you to search?
The different record sets provided in the Saved Searches window restrict your saved searches to different sets of sales campaigns.
The following table lists and describes the record sets for sales campaigns. Not all record sets are available to all users. For example, the record set involving subordinates is available only to managers.
**Tip:** To improve saved search performance, restrict your saved searches to smaller record sets. For example, rather than searching all the records you can see, search all the records you and your subordinates own. Or restrict your searches to a smaller geographical area. For example, search all the sales campaigns in one state instead of the whole country.

<table>
<thead>
<tr>
<th>Record Set Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I own</td>
<td>Sales campaigns that you created.</td>
</tr>
<tr>
<td>My subordinates own</td>
<td>Sales campaigns owned by your subordinates.</td>
</tr>
<tr>
<td>All records I can see</td>
<td>Sales campaigns that you can view based on your sales team membership, your position in the organization, and security permissions.</td>
</tr>
</tbody>
</table>
7 Managing Leads

Lead Management: Overview

Lead management features help to align marketing and sales objectives from lead generation to lead execution. This ultimately contributes to increasing revenues. Lead information is generated and captured from:

- A company’s existing contacts
- Sales campaigns

All leads then undergo the qualification and assessment process and are qualified either manually by a salesperson or automatically based on predefined rules. Finally, qualified leads are converted into opportunities.

How Lead Components Fit Together

A sales lead cycle ends when a lead is converted to an opportunity or when a lead is retired. A lead is retired if no possibility exists for converting the lead to an opportunity. The lead life cycle includes an automated process that captures leads and then prioritizes them for sales engagement through a scoring and ranking process. Leads are distributed to appropriate sales resources for further lead qualification, follow-up, and conversion.

Leads Life Cycle

Leads are automatically monitored for sales representative acceptance. Unaccepted or rejected leads are reassigned as appropriate. The quality of the lead is continuously reviewed and adjusted by the lead owner at different stages of the lead life cycle. The lead owner can be a marketing resource or a sales resource, depending at what stage the lead is at in its life cycle. The lead life cycle is captured in the following sections:

- Lead Generation
- Lead Qualification
- Lead Distribution
- Lead Assessment
- Lead Conversion

Lead Generation

Leads are generated and captured from many different sources such as:

- Campaign responses
- Campaign stages handled by telemarketing
- Third-party lead sources
- Sales prediction application through the creation of new leads

Flexible lead import, customer and contact creation, and deduplication ensure that marketing lead generation efforts are optimized. For example, the lead import process checks whether leads represent new or existing customers. For new
customers, data must be created for the lead. If the lead is an existing customer, then part of the lead import process checks to ensure customer and lead information isn’t duplicated.

Lead Qualification

Marketing departments help with the lead qualification process to ensure that only qualified leads are handed over to sales. Leads are typically ranked as Hot, Warm, or Cool. Leads are further qualified by the use of company-specific standard questions to score a lead. Lead scores are numeric values typically ranging from 1 to 100, in which a high score represents high quality.

It isn’t good practice to let stale leads build up. Standardized criteria for lead qualification ensure that quality leads reach the sales representative and help maximize the conversion rate from leads to opportunities. For example, your organization has criteria and processes for ensuring that leads are either developed or retired within 30 days. When the lead age is greater than 30 days and the rank is Warm, Marketing reassigns the leads for follow-up by an internal telemarketing group. If the leads can’t be qualified or further developed to revenue opportunities, then the rejected leads can be reassigned or can be retired manually.

Lead Distribution

As the qualification of leads progresses into real potential prospects, assignment manager uses expression-based rules to associate one or more internal sales representatives with each lead. If the lead is associated with either a sales prospect or a sales account, then assignment manager uses territory definitions to associate (typically one) internal territory with each lead. The sales representative newly assigned to the lead can be related to the lead record directly through the lead team or indirectly through a territory associated with the lead. The sales representatives can view and update those leads assigned to them in the lead work area and can claim ownership of the lead by accepting the lead.

Other assigned resources can view and update the lead, but they can’t make themselves the owners. If a sales prospect changes to a sales account by adding an address, assignment manager is automatically called during the next automated assignment cycle. Depending on the assignment logic, the lead can be reassigned to a different territory or sales resource. If the assigned sales representative takes no action on a lead for several days, then the lead can be manually reassigned to another sales representative.

Lead Assessment

Sales representatives must evaluate the quality of the information that they have received for the lead. They determine whether the details are sufficient to reach out to the customer and assess whether a lead is worth pursuing with the help of preconfigured assessment templates. Assessment templates can qualify the lead by:

- Reviewing the content shared with the customer during a campaign
- Framing the lead in the context of the campaign
- Ensuring the salesperson understands the information that has already been sent to the customer

You use the lead assessment feature to assess leads. Predefined questions help determine the likelihood of the lead being accepted by Sales. For example, you’re a sales representative and you ask the customer a series of questions created by Marketing and Sales to assess the quality of the lead. You record the answer of each question and the lead assessment tool automatically factors the answer into the assessment score of the lead. At the end of the call, you note that the assessment lead score is high, so you request that the lead is assigned to the direct sales team. If the lead score was low, then you might want to retire the lead. If the lead needs qualifying, then you can decide to leave it in your list of leads for follow-up. Finally, if the lead is good, but the potential revenue opportunity is less than a predetermined monetary amount, for example, twenty-five thousand dollars, then you can convert the lead to an opportunity to pursue as part of the sales cycle.
Lead Conversion

After establishing that the lead has potential, the sales representative can convert the lead to an opportunity. You can schedule meetings and presentations with your lead contact to move the opportunity along the sales pipeline. To track the progress of the lead, you can capture contact notes and associate them with the contact and opportunity. As the lead progresses through its life cycle, decisions to retire the lead are based on the following:

- You can’t verify the customer and lead details.
- The customer isn’t interested in pursuing the lead any further.

Differences Between Response, Lead, and Opportunity: Explained

This topic describes the main differences between a response, a lead, and an opportunity.

<table>
<thead>
<tr>
<th>Response</th>
<th>Lead</th>
<th>Opportunity</th>
</tr>
</thead>
<tbody>
<tr>
<td>A response is an interaction initiated by the customer in response to a marketing stimulus. Every outbound marketing activity is a marketing stimulus.</td>
<td>A lead is an inquiry, referral, or other information, obtained through marketing campaigns, or other means that identifies:</td>
<td>An opportunity is a pending sale of a product or service that can be forecasted and tracked using summary data such as:</td>
</tr>
<tr>
<td></td>
<td>• Potential contact or prospect</td>
<td>• Potential revenue</td>
</tr>
<tr>
<td></td>
<td>• Specific purchase interest</td>
<td>• Sales stage</td>
</tr>
<tr>
<td></td>
<td>You can create a lead if the specific purchase interest is not known when the lead is created. However, to qualify a lead you must record a primary purchase interest.</td>
<td>• Win probability</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Expected close date</td>
</tr>
</tbody>
</table>

Responses are created from interest recorded from responders in response to marketing activities. Responses include:

- Providing answers to phone survey questions
- Subscribing to a list
- Replying to an e-mail response form request

As interest for the product or service matures, responders are elevated as leads.

Responses are solely owned by Marketing and aren’t included as part of the sales forecast.

Leads are mostly created by automated lead capture or lead import processes which periodically create qualified responders as sales leads.

Leads are sometimes created from the response data of a contact or prospect who has expressed a need or interest in a product or service offered by the business.

Leads are transferred between Marketing and Sales departments based on how the lead progresses through its life cycle. Leads aren’t included as part of the sales forecast.

Opportunities are created by sales administrators when they have identified a qualified lead with a potential revenue opportunity. Leads are converted to opportunities when significant sales investment is foreseen to close the deal.

A salesperson can create opportunities from scratch, without previously having a response or lead created.

Opportunities are solely owned by Sales who have complete responsibility for managing the life cycle of an opportunity.

Inclusion of opportunities in the sales forecast is at the discretion of the sales administrator. However, not all opportunities are included and the decision to include them may depend on your company’s requirements.
Lead Actions: Explained

Use lead actions to manage leads. This topic provides a brief description of the actions that you perform on a lead. Lead actions are generally grouped into the following categories:

- Standard create, edit, delete, and update functions such as performing a mass update
- Ranking, scoring, and qualifying actions to assist in prioritizing leads
- Accepting, rejecting, reassigning, and retiring actions to ensure leads are in the right queue for pursuing
- Converting leads to opportunities to continue sales pursuits and include in sales forecasting

The ability to perform each action depends on:

- Privileges assigned to your role
- Access level as a lead sales team member
- Current status of the lead

Lead Actions

The following table shows the actions that you can perform to manage leads:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass Update</td>
<td>Performs a mass update of specific attributes and custom attributes from the Leads Overview work area when selecting multiple records.</td>
</tr>
<tr>
<td>Rank</td>
<td>Submits the Request Sales Lead Assignments process to automatically assign a lead rank based on predefined rules specified in the Assignment Rule for Ranking Leads profile option. A rank represents the priority of the lead, such as Hot, Medium, and Cool.</td>
</tr>
<tr>
<td>Score</td>
<td>Submits the Request Sales Lead Assignments process to automatically assign a lead score based on predefined rules specified in the Assignment Rule for Scoring Leads profile option. Lead assignment score is different from qualification and assessment scores. A lead score can be used as a source for predefined rules that automatically assign lead rank, qualification status, territories, and resources.</td>
</tr>
<tr>
<td>Qualify</td>
<td>Updates the lead status to Qualified, bypassing the automated sales lead classification process.</td>
</tr>
<tr>
<td>Reassign</td>
<td>Provides choices for when the sales lead assignment process evaluates the lead to reassign sales team members and territories to the lead:</td>
</tr>
</tbody>
</table>
|            | - **Automatic assignment**  
<p>|            |  Lead is selected for reassignment and is reassigned when the Request Sales Lead Assignments process next runs using the Reassign process selection criteria.                                                                 |
|            | - <strong>Immediate automatic assignment</strong>                                                                                                               |</p>
<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Immediate</td>
<td>Runs the Request Sales Lead Assignments process, reevaluating, and reassigning per the process.</td>
</tr>
<tr>
<td>Manual</td>
<td>You can select an owner to assign to the lead from a list of eligible resources.</td>
</tr>
<tr>
<td></td>
<td>A lead must have a Qualified or Unqualified status to be reassigned.</td>
</tr>
<tr>
<td>Retire</td>
<td>Updates the lead status to a retired lead indicating the lead is no longer one that needs pursuing.</td>
</tr>
<tr>
<td>Reject</td>
<td>Removes you as the lead owner. The accepted indicator and assignment status are also updated to reflect that the lead is no longer accepted. The lead is eligible for reassignment when:</td>
</tr>
<tr>
<td></td>
<td>• The next scheduled Sales Lead Processing Activity submits the Request Sales Lead Assignments process</td>
</tr>
<tr>
<td></td>
<td>• The lead meets the processing activity's selection criteria</td>
</tr>
<tr>
<td></td>
<td>• The previous lead owner is excluded when assigning team resources</td>
</tr>
<tr>
<td></td>
<td>The reject reason, and the number of times the lead is rejected, is available when searching leads. This information is displayed in the Overview page for analysis and to provide possible indicators that the lead should be retired.</td>
</tr>
<tr>
<td>Accept</td>
<td>Updates the lead with you as the owner. The Request Sales Lead Assignments process is submitted to automatically assign sales team territories and resources based on predefined rules. The rules are specified in the Assignment Rule for Ranking Leads profile option.</td>
</tr>
<tr>
<td>Convert</td>
<td>Creates an opportunity based on lead information. The lead status is updated to converted.</td>
</tr>
<tr>
<td>Submit</td>
<td>Click Submit for Approval when you are ready to register the lead for the approval of a channel account manager.</td>
</tr>
</tbody>
</table>

**Lead Statuses: Explained**

The status of a lead is primarily determined by a user performing an action on a lead, or upon successful completion of the lead qualification activity. This topic describes the different lead statuses. Once leads have been assigned to lead qualifiers or related sales roles, lead follow-up activities begin. As specific actions are performed on a lead, the status of the lead changes accordingly.

**Lead Status**

The following table describes the statuses of leads:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unqualified</td>
<td>A lead with a status of unqualified signifies that the lead requires additional information and qualification activities by the lead team. Unqualified is the default status assigned to all newly created leads.</td>
</tr>
<tr>
<td>Status</td>
<td>Description</td>
</tr>
<tr>
<td>----------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Qualified</td>
<td>A qualified lead signifies that the lead is ready for sales attention. The status can be updated to qualified by either the user selecting the Qualify action or upon successful completion of the qualification processing activity. Leads can have a status of qualified based on many factors including the status of the budget and the time frame of the project.</td>
</tr>
<tr>
<td>Converted</td>
<td>When a lead is converted to an opportunity, then the status is set to Converted.</td>
</tr>
<tr>
<td>Retired</td>
<td>The status of a lead is updated to Retired when a user selects the Retire action. A lead is retired when:</td>
</tr>
<tr>
<td></td>
<td>• There is no likelihood of the lead being converted to an opportunity</td>
</tr>
<tr>
<td></td>
<td>• A lead is no longer followed up by Sales</td>
</tr>
<tr>
<td></td>
<td>• A lead is not evaluated by Marketing over a certain period of time</td>
</tr>
</tbody>
</table>

**Creating Leads with New Contact and Account: Procedure**

You can enter leads for new sales prospects without associating an existing contact or account with the lead. As part of the lead management ready to use functionality, this is achieved by typing the contact name and account name directly onto the lead.

**Creating Leads with New Contact and New Account**

To create a lead for a new sales prospect without associating an existing contact and account:

1. Sign in as a salesperson and navigate to the Leads area.
2. Click **Create Lead**.
3. From the **Create Lead** page, enter the name of your contact in the **Primary Contact** field.
   - As you enter the name, note that any existing matching contacts are automatically suggested which you can choose to ignore, as applicable.
4. Enter the name of the account in the **Account** field.
5. Enter other lead details as required, and when finished, click **Save and Close**.

When you convert the lead, the **Primary Contact** and **Account** on the converted lead will show links to the newly created contact and account.

**Converting Leads with New Contact and Account: Procedure**

You can convert leads for new sales prospects with a new contact and a new account. When a sales prospect lead is converted, a new contact and account are created in Oracle Sales Cloud along with a new opportunity.
Converting Leads with New Contact and New Account

To convert a lead for a new sales prospect with a new contact and a new account:

1. Sign in as a salesperson and navigate to the Leads area.
2. Select the sales prospect lead that you want to convert.
3. From the **Edit Lead** page, enter other lead details as required and when finished, click **Save**.
4. From the **Actions** menu, select **Convert**.
5. From the **Convert** dialog, click **Submit**.

A new contact and a new account are created during the lead to opportunity conversion. The newly created contact and account are now associated with both the opportunity created during conversion and the converted lead. The **Primary Contact** and **Account** fields on the converted lead contain links to the newly created contact and account. Prior to the conversion, they are both listed as a value in their respective drop down lists.

Lead Qualification: Explained

The lead qualification process can either be performed by internal marketing or internal sales groups. This topic provides a brief overview of what constitutes a qualified lead. Qualifying leads is an important first step in bringing the sales lead to a conclusion. At the end of the lead qualification process, you can classify the lead as a qualified lead that is ready for conversion to an opportunity. Or you can retire the lead if the purchase interest for the lead can't be validated. What constitutes a qualified lead varies from company to company.

Basic Lead Qualification

In some companies, basic lead qualification data is gathered by lead qualifiers and contains data such as:

- Customer need
- Urgency or time frame for the project
- Budget considerations such as available amount and status

The scheduled process that determines lead qualification status also takes into consideration basic lead data.

Additional Lead Qualification

In other companies, the lead qualifier or salesperson uses a lead qualification questionnaire as part of the qualification process. Based on the answers received, he or she can decide to manually set the lead to a Qualified status using the lead actions menu. Your application administrator assigns the questionnaire to your Lead Qualification Template profile. The answers entered are assessed using a weighted scoring model with instant feedback available as a scoring status bar in the UI.

**Related Topics**

- Defining a Sales Lead Qualification Template: Example
Performing a Lead Qualification: Procedure

Lead qualification helps in the lead follow-up process, in which the sales representative continues to assess the lead quality and lead conversion potential by using the preconfigured qualification templates.

Lead qualification is part of the lead follow-up activity where you further nurture the lead in order to qualify it. Your administrator must set the Advanced Lead Qualification Enabled profile option after the qualification templates are created. This action specifies the qualification template to display in the Edit Lead UI to assist with evaluating the lead.

You can conduct a lead qualification, view completed lead qualifications, and view the responses to the questions posed in the qualification template. Qualification templates enable you to analyze the lead and suggest the appropriate next steps based on the overall assessment score and feedback for the lead.

Performing a Lead Qualification

Use the following procedure to perform a new lead qualification.

1. From the Navigator, click Leads.
2. In the list of leads, click on a lead to edit it. The Edit Lead page appears.
3. Click the Qualification tab to open the default qualification template.
4. Fill out and complete the lead qualification template.

If there are multiple qualification templates associated with the lead, then you can choose to select a different qualification by clicking Replace Qualification.

Related Topics
- Creating Assessment Templates: Procedure
- Assessment Template Score Range: How It’s Calculated
- Assessment Template Components: How They Fit Together

Performing Multiple Lead Qualifications: Explained

When you create a lead, you can perform qualification on the lead leveraging the many templates provided by your sales organization. This means you can evaluate various aspects of the lead which can subsequently help you sell more by converting the leads in less time.

Choosing the Qualification Template

After you create the lead, go to the Qualifications tab and view the recommended qualification that is created for you by your organization. You proceed to fill out and complete the qualification template. If there are multiple templates associated with the lead, select one by clicking Replace Qualification. Any responses for the current qualification will be reset and can’t be restored. You can choose to cancel the operation and use the current qualification template, or you can choose to continue.

If you continue, the qualification UI is refreshed to display the questions from the new template that you selected. You can then start providing responses to the questions. You can track the updates on the current qualification from the Qualification
status fields on the page. Statuses toggle between: Not Started, In Progress, and Completed. You can also include other status values such as the number of questions you have answered, last updated date, and name of the template. You can also track the total score by summing up the weighted answers and viewing a graphical circular format of the score.

Applying Mass Update to Leads

You can update attributes, including custom attributes, on multiple leads at once using the Mass Update feature. This topic explains how to use the Mass Update feature to apply changes to multiple fields on multiple leads at once. For example, you might want to change a custom field, such as Expiration Date, on multiple leads. You can query leads using the Expiration Date field, and then select which leads you want to update all at once. You can also use the Mass Update feature to update product information or primary contact information for leads.

Before you can use mass update, your system administrator must enable the update action using Application Composer and, optionally, set a profile option that controls how many lead records you can update at once.

You can update up to four fields on multiple leads using the **Update** action. You can update any of the following fields:

- Account
- Budget Amount
- Budget Status
- Campaign
- Currency
- Customer Need
- Deal Size
- Decision Maker Identified
- Description
- Primary Contact
- Primary Product
- Rank
- Sales Channel
- Source
- Time Frame

If custom fields have been defined, these are available for update as well.

Applying Mass Update to Leads

To apply a mass update to leads, perform the following steps:

1. From the **Leads** landing page, enter the search criteria for the leads that you want to update, and click **Search**.
2. Based on the leads returned from your search criteria, select the leads that you want to update at the same time.
3. From the **Actions** menu, click **Update**.

You can select or deselect leads by a single click on the lead record in the list. Use the select all and deselect all links to select or deselect all leads.
**Note:** By default, all the lead attribute fields on the Mass Update dialog box are read-only until you select to update them.

4. Select the attributes that you want to update and assign a value for each of the selected attributes. For lead attribute lists, their default value is displayed. Text fields are blank by default.

5. Click **Save and Close**.

Related Topics

- Enabling Mass Update for Leads

## Qualifying Leads: Examples

This topic explains the lead qualification process and provides examples of the different methods used for qualifying leads.

### Lead Qualification Process

Lead quality is assessed as soon as a lead is generated and is mainly based on:

- The characteristics of the customer contact on the lead
- The type of response which caused the lead to be generated
- The type of sales campaign that the lead may be associated with

Leads are enriched further, typically by means of prequalification telemarketing activities performed by internal marketing, internal sales groups, or external third-parties. Qualification data is added to the lead such as:

- Customer need
- Urgency or time frame for the project
- Budget considerations such as available amount and status

At the end of this process, the lead is either:

- Classified as a qualified lead which is ready for conversion to a sale
- Retired if purchase interest for the lead can’t be validated

The following scenarios illustrate some of the lead qualification processes.

### Rule-Based Lead Qualification

The rule-based lead qualification process requires that the value of the **Lead Status** attribute be set to Qualified if qualification rules evaluate to a positive answer. For example, consider the rule:

**IF budget status is approved AND time frame is 3 months**

**AND decision maker has been identified**
AND response type is attended event

THEN rule is passed

ELSE rule is failed.

If this rule evaluates to TRUE, the value of Lead Status is set to Qualified.

Internal Marketing Qualification

Internal lead qualifiers or inside salespeople conduct phone conversations to gather qualification data about leads. They can use qualification templates to define consistent and specific qualification criteria for similar leads. The qualification questions are tailored to a specific product, industry, and source of the lead.

Before updating the lead status to qualified, the lead must have a valid primary product associated with it. Users can select multiple leads and select Qualify from the Actions list. Leads meeting the requirements for lead qualification are processed.

As the qualification data is gathered using the leads management user interface, the lead qualifier or salesperson can decide to manually set the lead to Qualified status. In some companies, the lead qualification data gathered by lead qualifiers is considered in the scheduled automated lead process. For example, the assignment manager engine can calculate lead score or lead rank, as well as assign sales team territories. For such companies, a simple rule to move leads to a Qualified status when the lead score reaches a specific threshold is sufficient.

A lead can be qualified when the basic attributes of the lead indicate interest in the purchase of a product. For example, basic attributes might include:

- Contact attended a product event
- Budget is approved
- Purchase time frame is less than a year

The Additional Qualification tab displays the qualification template with questions where you can enter the answers on the same page. Most of the data required to qualify the lead is available from the Basic Qualification area of the Lead details page. Supporting data is included in the contextual area for easy reference.

Internal Sales Group Qualification

Leads are generated and captured from many different sources. The sales prediction system generates and captures leads. Leads are created when customers are created. Leads are also generated from leads that already exist. After salespeople accept those leads generated by the sales prediction system, they can evaluate the quality of the information received for the lead. They determine if the details are sufficient to reach out to the customer and assess whether a lead is worth pursuing with the help of predefined assessment templates. If they can establish that the lead has potential and can be marked as qualified, they can then convert the lead to an opportunity. Contact is established and meetings and presentations are scheduled to move the opportunity along the sales pipeline.

External Third-Party Qualification

External third-party qualification involves using input from a third-party source to qualify leads. For example, your company has obtained a list of contacts that purchased a car in the last 90 days. You have hired a telemarketing company to call
each contact to determine if there is interest in your company’s auto security products. The third-party telemarketer provides weekly files of potential contacts who are interested in your products. Using the file-based data import feature and qualification rules configured using the assignment manager engine, the interactions resulting from the telemarketer’s activities are imported as leads. The marketing operations manager schedules the rule-based qualification process to occur as soon as the enriched lead data is imported to the lead management application. If the rules evaluation is successful, the result sets the lead status as Qualified.

Related Topics

- Lead Assessments: Explained
- Lead Ranking: Explained

Lead Ownership and Sales Team Resources: Explained

A market is typically organized into territories that comprise customers and prospects. Marketing is closely aligned with sales, and marketing activities are launched to generate leads and maintain the strength of the sales pipeline. This topic explains lead ownership and sales team resources.

When the lead doesn’t have any owner, the sales representative can accept the lead which makes him or her the lead owner. All resources who are given access to leads get full access. Full access level allows the user to update the sales lead team by adding or removing individual resources. Hence, territory resources, sales team members and lead owner and resources in their hierarchy, all get full access. Territory team members inherit the access level of the territory. All members of sales territories assigned to the lead have full access to the lead. Ancestor territory owners of all sales territories assigned to the lead also have full access to the lead. Resources who access leads have different roles as follows:

- Operations
  Support an automated process to capture leads, prioritize leads for sales engagement, and distribute the leads to appropriate sales or territory team resources.
- Marketing and lead qualifiers
  Monitor leads, reassign leads, and continually review and adjust the lead quality.
- Sales and territory teams
  Enable lead qualification, perform follow-up lead activities, and convert leads to opportunities.

This topic includes the following sections:

- Lead, Sales, and Territory Resources
- Assignment of Leads to Marketing and Sales Resources
- Sales Resource Role

Lead, Sales, and Territory Resources

Sales resources are organized into flexible teams and are associated with the sales territories. These sales territories are then assigned to customers, leads, and opportunities to carry out the sales process. The lead follow-up team can include a lead team comprised of individual sales resources who are predominantly active during the lead qualification stage. All sales resources who are assigned to the territory team can view and follow up the lead.
Assignment of Leads to Marketing and Sales Resources

Qualified leads are assigned to a sales team based on sales territories. Unqualified leads are assigned to individual lead qualifiers either manually or based on rules defined in the assignment manager engine. Users can be assigned to a lead in one of the following ways:

- Ownership through lead creation
- Territory-based lead assignment
- Rule-based sales team member assignment
- Manual selection of resources

Sales Resource Role

The sales resource performs the following activities:

- Review quality leads that are augmented with sales collateral, marketing content, customer contact interactions, and references.
- Qualify and assess the lead quality further with the help of customized assessment templates.
- Use the resource drop-down list to manually select a resource to add to the team.

Include a description to indicate what role the resource has on the sales team. Many sales team members can access each lead, and each team member is identified as either an internal (sales force), or an external (channel partner sales force) resource. Each sales team member can be associated with a specific resource role to indicate what capacity the member has on the lead.

- Add additional contacts and products to the lead as the lead moves further down the sales cycle.

Sales Lead Team Examples

A sales lead team comprises assigned territories and individual team members. This topic provides examples that illustrate some of the features available for the sales lead team:

- Automate assignment of territories to lead territory team
- Automate assignment of individual resources to sales lead team
- Add ad hoc members to sales lead team
- Update access rights based on the resource
- Change the lead owner

Automate Assignment of Territories to Lead Territory Team

A lead exists with your company to purchase 50 large wind generator units in several Western Region states. To ensure that Western Region salespeople are assigned to the lead, your administrator uses the assignment manager capability to automatically add the Western Region territory to the lead territory team.
Sales departments arrange the sales force based on sales territories. Sales resources are organized into flexible teams and are associated with the sales territories. These sales territories are then assigned to customers, leads, and opportunities to carry out the sales process. A territory is the range of responsibility of salespeople over a set of sales accounts. Territories are assigned to sales accounts when the sales accounts are created. The sales lead team comprises:

- Assigned territories and special resources that are manually assigned to the team on an ad hoc basis.
- Resources that are added automatically through the automatic assignment of individual resources.

Automate Assignment of Individual Resources to Sales Lead Team

The sales lead team for your company wants to add a support person to the lead. Typically, support people are not part of any sales territory. You can use the Manage Sales Lead Assignment Rules area to set up a rule set group. For example, you can assign support team members as individual resources based on rules which match the lead product with specific support team members.

Add Ad Hoc Members to Sales Lead Team

Generally, sales team resources are automatically assigned to leads based on configured assignment rules. The following scenarios provide examples of when you may want to manually add additional team members to assist with the lead.

- The lead owner, who has full access to your company lead, wants to add one of his company’s contractual experts to his team to help pursue the lead. The lead owner manually accesses the resource drop-down list and selects the ad hoc resource that he wants to add to his team.
- When pursuing a lead for an insurance policy, the customer contact requests a unique and complex combination of policy components that require an expert in the company to review. The lead owner adds the expert resource to the lead with full access. Now the expert resource can update the lead with valid combinations of products and services, and, if required, add more team members to the team.
- A salesperson is pursuing a lead that requires the export of products outside the country. He wants to ensure there are no legal issues with exporting the products. The salesperson adds a member of their company’s legal counsel to the lead to review the details before contacting the customer again.

Update Access Rights Based on the Resource

When a resource is added to the sales lead team through rule-based assignment, a profile option determines the member’s default access level. Resources in the management hierarchy of a newly added team member have the same level of access to the sales leads as the team member.

All members of the sales territories assigned to the lead have full access to the lead. Owners of ancestor territories of all sales territories assigned to the lead also have full access to the lead.

Change the Lead Owner

Only the lead owner, or the resources in the management hierarchy of the lead owner, can change the ownership of the lead.
Related Topics

- Sales Users Access to Leads: Explained

FAQs for Managing Leads

How can I check for duplicate leads?

As a sales representative you want to know if your leads for new contacts or accounts have any duplicates in the application. You can manually check for leads duplicates from the edit leads page. Select the lead that you want to check and from the Actions menu, select Duplicate Check. Duplicate check can only be run on new (non-existing) contacts and accounts.

A message is displayed if no duplicates are found for new contacts or accounts. If potential duplicates exist, the Resolve Duplicates page is displayed for the contact or account where you can select the appropriate contact or account to resolve any duplicates.

Why did the deal size change?

The deal size is automatically determined by the products entered for the lead. When you add or remove products for a lead the deal size is recalculated. You can override the calculated amount after all products are entered. For example, if the lead is eligible for a discount, you can manually change the total of the deal size to apply the discount. However, the application overrides the deal size total if you add or remove a product from the lead after having manually adjusted the deal size. In this case, you have to reapply the manual change.

What happens if I manually change a lead rank that was automatically assigned?

Lead rank suggests a priority to help you select leads for follow up. When the lead is created, a lead rank is first calculated by the assignment manager engine based on ranking rules. You can select a different lead rank from the list in the UI. When the lead is further processed, a different rank may be assigned based on enriched lead data, or the rules may cause the lead to revert to its original rank.

How can I add lead contacts to my sales campaign?

From the Leads overview area, select the lead you want to be part of your sales campaign. From the Lead details page, click the Contacts tab. Select the contacts that you want to add to your sales campaign. From the Actions menu, select Add to Sales Campaigns to view and select a campaign from your saved campaigns. Your selected contacts are notified either when you launch your sales campaign or at the next scheduled mailing if you set up your sales campaign to repeat.
What's the difference between lead qualification and lead assessment?

Lead qualification determines whether a lead has a budget and project timeline defined, and indicates if someone with purchasing authority is identified. Company-specific standard questions and the associated scoring mechanism help to capture the additional data critical to qualifying leads. A lead is typically considered qualified when the need and purchase interest are confirmed.

Lead assessment helps in the lead follow-up process, where the salesperson continues to assess the lead quality and lead conversion potential through preconfigured assessment templates. From the Assessment tab, the salesperson can conduct a new assessment, view completed assessments, and view the responses to the questions. Assessment templates provide the mechanism for the salesperson to analyze the lead and suggest appropriate next steps based on the overall assessment score and feedback for the lead.

Related Topics

- Lead Assessments: Explained
- Assessment Template Score Range: How It’s Calculated

Why was a customer reference displayed for my lead?

A customer reference is based on the customer industry and associated lead product or product group related to the specific lead. For example, a customer reference displays for your lead if a customer has purchased a similar product or service. You can leverage the reference details for effective lead follow-up.

The leads UI is designed to ensure that you are productive and can readily access related lead information with as few clicks as possible. Supporting data related to each lead is included in the contextual area for easy reference. It includes references to all open leads and open opportunities for the lead customer, as well as supporting collateral. This information is useful to the lead sales team to facilitate an effective lead follow-up.

What happens if I convert a lead to an opportunity?

You convert a lead to an opportunity when the lead is qualified and is ready for further processing along the sales cycle. Once the conversion is successfully completed, you can review the newly created opportunity using the opportunities UI. During your review, you might want to retain only a select few lead product lines to pursue as revenue on the opportunity. Since the conversion process automatically creates product lines (representing revenue) from all lead lines, you can remove unwanted product lines from the opportunities UI.

You can view opportunities associated with leads in the leads UI. When you convert a lead to an opportunity, the following rules may apply depending on the setup criteria for your company:

- The person converting the lead becomes the primary sales team member for the opportunity.
- The customer reference on the original lead is maintained for the opportunity.
- The associated lead team members are copied with the same primary team member.
- The newly created opportunity is assigned to the appropriate sales territories.
Can I create more than one opportunity from a single lead?

Yes, you can convert the same lead into another opportunity and then delete unwanted product lines. For example, during your review of an opportunity, you decide you want to retain only a select few of the lead product lines to pursue as opportunity revenue. Since the conversion process automatically creates the product lines from all lead lines, you can remove unwanted product lines from the opportunity details page. You can, at a later stage, create another opportunity from the removed lead product lines by converting the lead to an opportunity again. You can then decide to keep only those product lines that you want on the newly created opportunity.

Why can't I see converted leads in my list of opportunities?

If you don’t see the converted lead in your list of opportunities, this means that the opportunity is assigned to a different territory.

Who can view the record sets for leads for saved searches?

The different record sets provided in the Saved Searches window restrict your saved searches to different sets of leads. The following table lists and describes the record sets for leads. Not all record sets are available to all users. For example, the record sets involving subordinates are available only to managers.

- **I own**
  Leads you own, including those leads you created or where ownership is assigned to you.

- **I am on the team**
  Leads where you are on the lead team. You are on the lead team if you are the lead owner or were added as a member by another team member.

- **My territory**
  Leads in your sales territories.

- **My subordinates own**
  Leads where you or your subordinates are on the lead team.

- **My territory hierarchy**
  Leads in your sales territories and all of their subordinate territories in the sales territory hierarchy.

- **All records I can see**
  Leads that you can view based on your lead team membership, sales territory assignments, your position in the organization, and security permissions.

---

 Tip: To improve saved search performance, restrict your saved searches to smaller record sets. For example, rather than searching all the records you can see, search all the records in your territory hierarchy. Or restrict your searches to a smaller geographical area. For example, search all the leads in one state instead of the whole country.
Managing Opportunities

Opportunities: Overview

Opportunities allow organizations to support the full sales process, from leads, to opportunities, to sales, to follow-up analytics. Within opportunities, sales organizations can capture a wide variety of information related to an opportunity, such as customer (account) and the products to be sold. In addition, they can use the supplied sales methods and sales stages to step the opportunity to its eventual conclusion.

The following table lists opportunity features.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Support the sales life cycle</td>
<td>Create, manage, and close opportunities, supporting the entire sales life cycle. By integrating with leads, you can convert leads to opportunities. Post-sale, take advantage of supplied business intelligence reports on the sales.</td>
</tr>
<tr>
<td>Maintain opportunity information</td>
<td>Following are just some of the data that sales teams can capture for an opportunity:</td>
</tr>
<tr>
<td></td>
<td>• Accounts: You can associate an account (for example, a customer or prospect) with the opportunity.</td>
</tr>
<tr>
<td></td>
<td>• Opportunity owner: The person who creates an opportunity is automatically assigned ownership. You can change owner if needed.</td>
</tr>
<tr>
<td></td>
<td>• Contacts: You can associate contacts with an opportunity. In addition, you can specify a contact’s role, affinity, and influence level on an opportunity. A single contact can be marked as primary.</td>
</tr>
<tr>
<td></td>
<td>• Currency: The application supports multiple currencies at both the opportunity header and revenue-line levels.</td>
</tr>
<tr>
<td></td>
<td>• Budget: A Budgeted indicator lets you display whether the opportunity revenue amount has been budgeted by the customer, as well as the date that the budget was made available.</td>
</tr>
<tr>
<td></td>
<td>• Competitors and partners: You can associate partners and competitors with opportunities, both at the opportunity and revenue line levels.</td>
</tr>
<tr>
<td></td>
<td>• Marketing data: The Source field allows the association of sales campaigns with an opportunity.</td>
</tr>
<tr>
<td></td>
<td>• References: You can associate reference customers with opportunities to improve the selling process.</td>
</tr>
<tr>
<td>Employ sales methodology</td>
<td>Your company can employ its own sales methodology by using the supplied sales methods and stages. For each sales stage, administrators can create action items (process steps), task templates, recommended documents, assessment templates, and required fields for use in opportunities. In addition, administrators can specify a different default win probability percentage for each sales stage.</td>
</tr>
<tr>
<td>Use Sales Coach for guided selling</td>
<td>Sales Coach, part of sales methods, guides salespeople through each step of the sales cycle with an organization’s own sales methodology and best practices. The action items (process steps), task templates, recommended documents, assessment templates, and mandatory fields set up by your administrator in each of the sales stages translate into guided notes and appropriate opportunity UI interactions.</td>
</tr>
<tr>
<td>Leverage the product revenue model</td>
<td>Opportunities support a product revenue model that features revenue-based forecasting, products and product groups, recurring revenue, and revenue data captured at the line level, such as win probability, close date, include in forecast, and status.</td>
</tr>
</tbody>
</table>
Feature | Details
--- | ---
Assign sales team | Opportunities align with territories and the assignment engine for rule-based or territory-based autoassignment of salespeople to opportunities. In the team pages, you also can manually add sales team members to an opportunity.

Allocate sales credit | By allocating sales credit to salespeople on product lines, you can capture the amount of credit salespeople receive for the sale. You can track direct, channel, and overlay resources and their contributions using revenue and nonrevenue credit splits.

Use forecast territories on product lines | By integrating with forecasting, you can use forecast criteria to automatically include product-line revenue in the forecast. You can leave the default forecast territory on the product lines or assign another forecast territory. The forecast is refreshed in real-time from revenue when an opportunity is created or updated.

Assess opportunities and their products, contacts, and competitors | You can use assessments to evaluate the health of an opportunity or an opportunity product, contact, or competitor. After setup by the administrator, assessments are available to salespeople in the Assessments tab.

View business intelligence reports | Several supplied business intelligence reports give you views into sales metrics, from lists of opportunities and accounts, to pipeline data, sales team performance, and other revenue metrics.

Related Topics
- Opportunity Products and Revenue: Overview
- Sales Credits: Overview
- Sales Methods, Sales Stages, and Sales Coach: Overview
- Sales Prediction: Overview

Working with Opportunities

Why did some fields change when I changed the sales stage?

When you move an opportunity from one sales stage to the next, the opportunity-level win probability increases to reflect the progress of the opportunity. The win probabilities of all product lines that are in sync with the opportunity-level win probability also change to match the opportunity-level probability.

During setup, the administrator can specify the default win probability for each sales stage.

Which fields or data are initially set on an opportunity?

Several fields are initially set to default values when you create an opportunity, as described in this topic.
Following are the fields initially set to default values when you create an opportunity:

- Sales Channel: Set to Direct
- Currency: Determined by the settings in user preferences
- Win Probability: Set to percentage determined by sales method or profile option
- Close Date: Set to 90 days from creation date
- Status: Set to Open
- Sales Method: Set to default sales method
- Sales Stage: Set to first sales stage in default sales method
- Owner: Set to user creating opportunity
- Revenue: Set to zero
- Worst Case: Set to zero
- Best Case: Set to zero
- Opportunity Number: Unique, application-generated number
- Created By: Set to user creating opportunity
- Creation Date: Set to current date
- Include in Forecast: Based on forecast settings

What information is required to create an opportunity?

Opportunity Name is the only field required to be filled out when creating an opportunity. Note, however, that the name and sales account combination must be unique. In other words, you cannot have two opportunities with exactly the same name and associated to the same sales account.

What happens if I change win probability?

If you change win probability at the opportunity level, the application updates the win probability of all opportunity product lines that are in sync. In addition, if you update win probability at the product level, the product lines included in the forecast may change, depending on whether the line matches forecast criteria or not.

How is the expected close date of an opportunity initially set?

When defining a sales method, administrators can input the average close window of the sales method, in days. The value is then used to set the default close date of opportunities using that sales method.

What's a billing account on an opportunity?

A billing account on an opportunity is the customer’s financial account to be used for the transaction.
What opportunities are displayed for My Open Opportunities and Open opportunities where I am on the team?

Selecting the **My Open Opportunities** list in the Opportunities work area landing page displays a list of all of the open opportunities expected to close within the current calendar or fiscal period where you are listed as the opportunity owner. You are automatically the opportunity owner if you created the opportunity. You also can be assigned as the owner by someone else.

Selecting the **Open opportunities where I am on the team** list displays a list of all of the open opportunities expected to close within the current calendar or fiscal period where you are on the opportunity team. You are on the opportunity team if you created the opportunity or you can be assigned to the team either by an automatic assignment process or by another team member.

What do the opportunity saved searches mean?

In the opportunities landing page, several different saved searches retrieve specific sets of records. The following table lists and describes the record sets for opportunities. Not all record sets are available to all users. For example, the record sets involving subordinates are available only to managers.

<table>
<thead>
<tr>
<th>Record Set Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I own</td>
<td>Opportunities you own include those opportunities you created or where ownership is assigned to you.</td>
</tr>
<tr>
<td>I am on the team</td>
<td>Opportunities where you are on the opportunity team. You are on the opportunity team if you are the opportunity owner or if you were added as a member.</td>
</tr>
<tr>
<td>My territory</td>
<td>Opportunities in your sales territories.</td>
</tr>
<tr>
<td>My subordinates own</td>
<td>Opportunities owned by you and your subordinates.</td>
</tr>
<tr>
<td>My subordinates are on the team</td>
<td>Opportunities where you or your subordinates are on the opportunity team.</td>
</tr>
<tr>
<td>My territory hierarchy</td>
<td>Opportunities in your sales territories and all of their subordinate territories in the sales territory hierarchy.</td>
</tr>
<tr>
<td>All records I can see</td>
<td>Opportunities that you can view based on any of the following:</td>
</tr>
<tr>
<td></td>
<td>• Your opportunity team membership</td>
</tr>
<tr>
<td></td>
<td>• Sales territory assignments on opportunity, customer, or partner accounts</td>
</tr>
<tr>
<td></td>
<td>• Your position in the organization</td>
</tr>
<tr>
<td></td>
<td>• Security permissions</td>
</tr>
</tbody>
</table>
How can I copy an opportunity?

While viewing the opportunity details, select Copy Opportunity from the Actions menu and enter a new, unique name for the opportunity.

In the desktop UI, the behavior is slightly different: You copy an opportunity from the opportunities overview (list view) page by selecting an opportunity and then clicking the copy icon.

What is copied when I copy an opportunity?

The application copies the following attributes when you copy an opportunity:

- Opportunity header attributes, including standard and custom fields
- Contacts
- Products:
  - Revenue information, such as quantity, unit price, revenue amount, and the like
  - Schedule information and the underlying scheduled transactions
  - Sales credits, including recipients, amounts, and percentages
  - Custom attributes of revenue
- Sales team, including partner resources
- Source
- Partners
- References
- Competitors
- Leads
- Custom child objects of the opportunity

The following are not copied:

- Notes
- Tasks
- Appointments
- Assessments
- Attachments
- Deal registrations

Applying Mass Update to Opportunities

You can update fields on multiple opportunities at once. For example, you can update the status or add comments for multiple opportunities at once.
You can modify up to four fields per update. The fields that you can update include:

- Budgeted
- Close Date
- Comments
- Currency
- Date Budget Available
- Estimated Deal Duration
- Include in Forecast
- Level of Risk
- Sales Stage
- Status
- Win Probability
- Win/Loss Reason

Several of the fields cannot have a blank value. These are:

- Currency
- Close Date
- Sales Stage
- Include in Forecast

**Mass Updating Opportunities**

Use the following procedure to update multiple opportunities at once.

1. In the Opportunities overview (also called the landing page or list page), enter the search criteria for the opportunities that you want to update, and click Search.
   The application returns a list of results based on your search criteria.
2. From the Actions menu, click Update.
3. Click on the opportunities you want to update.
4. After you have made your selections, click the Update button.
   The Update Opportunities page appears. The page title indicates how many opportunities you are updating.
5. In the left column, select a field that you want to update.
   After you make your selection, the application activates the right column for data entry or selection.
6. In the right column, assign a value for the selected field.
7. Click Submit to commit the changes.
   A page appears, confirming that the changes were successfully applied.
8. Click Done in the confirmation page to return to the overview page.

**Summary of Opportunity Business Logic: Explained**

This topic provides a summary of opportunity and product-line business rules relevant to opportunity close processes and their applicability in the edit opportunity, close opportunity, mass update opportunities, and mass update revenue lines flows.
The following table describes the synchronization update behavior during the close opportunity flow.

<table>
<thead>
<tr>
<th>Object or Field Being Updated</th>
<th>Behavior</th>
<th>Applicable to Edit Opportunity Flow</th>
<th>Applicable to Close Opportunity Flow</th>
<th>Applicable to Mass Update Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Win probability, close date, status</td>
<td>Copy opportunity attribute value to revenue line attribute values.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Win/loss reason</td>
<td>Copy opportunity attribute value to revenue line attribute values.</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>

The following table describes the field or attribute change behavior during a change to opportunity status in the context of the close opportunity flow.

<table>
<thead>
<tr>
<th>Opportunity Status Change</th>
<th>Behavior</th>
<th>Applicable to Edit Opportunity Flow</th>
<th>Applicable to Close Opportunity Flow</th>
<th>Applicable to Mass Update Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>To won</td>
<td>Set sales stage to last stage of sales method. Set win probability to 100 percent.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>To lost or no sale</td>
<td>Set close date to current date</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
| From open to closed        | • Enable win/loss reason  
   • Set actual close date to system time stamp                           | Yes                                 | Yes                                  | Yes                                    |
| From open to closed        | Copy primary competitor to revenue line where competitor is undefined     | No                                  | Yes                                  | Yes                                    |
| From closed to open        | • Set actual close date to undefined  
   Disable win/loss reason, Set win/loss reason to undefined.              | Yes                                 | Yes                                  | Yes                                    |

The following table describes the field or attribute change behavior during a change to opportunity revenue line status in the context of the close opportunity flow.

<table>
<thead>
<tr>
<th>Revenue Line Status Change</th>
<th>Behavior</th>
<th>Applicable to Edit Opportunity Flow</th>
<th>Applicable to Close Opportunity Flow</th>
<th>Applicable to Mass Update Opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>To won</td>
<td>Set win probability to 100 percent.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### Revenue Line Status Change

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Applicable to Edit Opportunity Flow</th>
<th>Applicable to Close Opportunity Flow</th>
<th>Applicable to Mass Update Opportunities</th>
<th>Mass Update Revenue Lines</th>
</tr>
</thead>
<tbody>
<tr>
<td>To lost or no sale</td>
<td>Set close date to current date.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
| From open to closed | • Enable win/loss reason.  
• Set actual close date to system time stamp. | Yes                                  | Yes                                     | Yes                       |
| From closed to open | • Disable win/loss reason.  
• Set win/loss reason to undefined.  
• Set actual close date to undefined | Yes                                  | Yes                                     | Yes                       |

The following table describes the validations done for competitor, win/loss reason, and status, during the close opportunity flow.

<table>
<thead>
<tr>
<th>Object Being Validated</th>
<th>Behavior</th>
<th>Applicable to Edit Opportunity Flow</th>
<th>Applicable to Close Opportunity Flow</th>
<th>Applicable to Mass Update Opportunities</th>
<th>Mass Update Revenue Lines</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competitor</td>
<td>If the profile option, Close Opportunity Competitor Requirement, is enabled, require competitor on opportunity and revenue line.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Competitor</td>
<td>Validation error dialog option to copy primary competitor to revenue line.</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Win/loss reason</td>
<td>If the profile option, Close Opportunity Win/ Loss Reason Requirement, is enabled, require win/loss reason on opportunity and revenue line.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Status</td>
<td>Revenue line status must be valid for opportunity status.</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Sales Coach is a mechanism to present best practice sales methodology to salespeople in order to improve their sales effectiveness. A teaching tool, Sales Coach can help less experienced salespeople with aspects of an opportunity when and where they need help. Administrators set up Sales Coach by associating action items and recommended documents with a sales stage. Salespeople can then view these items as they work their opportunities. Since the teaching components or job aids are associated with a specific sales stage, each sales stage potentially can have multiple action items and recommended documents associated with it.

Following are the areas that administrators can define for each sales stage:

- Action items (process steps)
- Recommended documents

**Action Items**

Action items are steps you should follow during a sales stage. For example, in Discovery, your company may recommend that you interview the potential customer, develop a product list, and schedule a presentation.

**Recommended Documents**

Recommended documents are helpful documents and resources, such as customer letter templates, relevant web sites, and training materials.

**Related Topics**

- Sales Methods, Sales Stages, and Sales Coach: Overview
- Sales Methods and Sales Stages: How They Fit Together

**Using Sales Coach**

**Watch:** This tutorial shows you how you can use Sales Coach within Oracle Sales Cloud to view action items, get recommended documents, and access assessments while editing an opportunity.
Managing Sales Competitors

Sales Competitors: Explained

In Oracle Sales Cloud, sales administrators can store a variety of details about sales competitor companies. As a salesperson, you can associate competitors with opportunities. You can also use competitor details when you want specific information about a competitor during a sales deal.

In the competitor profile screens, some of the details that you can view for a competitor include:

- Information about the competitor company, such as stock symbol, website, industry, and geography
- Threat level, such as high, medium, or low
- Experts who have knowledge about the competitor company
- Collateral associated with the company
- Opportunities associated with the competitor
- Product groups associated with the competitor
- Revenue at stake, which is potential revenue that could be lost
- Notes that have been entered in about the competitor company

For a procedure on viewing competitor information, see the topic, Viewing Competitor Information: Procedure.

Associating Competitors with Opportunities

You can associate competitors with opportunities, both at the header level and product-line levels, in order to capture the competitive information for a deal. After you associate a competitor with an opportunity, the opportunity shows up as associated with that competitor in the competitor’s profile screens. The application also uses the revenue on an opportunity that’s associated with a competitor to drive the revenue at stake metric, available in the competitor profile screens. For more information, see the topic, Associating Competitors with Opportunities: Procedures.

Note: Depending on how the close opportunity behavior is configured, you may be required to enter a competitor when closing an opportunity.

Associating Competitors with Product Groups

You can associate competitors with product groups in the desktop UI customers pages. After you associate a competitor with a product group, the product group shows up as associated with that competitor in the competitor’s profile screens. See the topic, Associating Competitors with Product Groups: Procedure, for more information.

Viewing Competitor Information: Procedure

In Oracle Sales Cloud, sales administrators can store a variety of details about sales competitor companies. As a salesperson, you can associate competitors with opportunities. You can also use competitor details when you want specific information about a competitor during a sales deal.

Use the following procedure to view competitor information.

1. Sign in as a sales user, such as a sales representative or sales manager.
2. Click the **Competitors** icon in the navigator.

The list of competitors displays.

3. Select a competitor in the list.

The Edit Competitor page appears.

4. View the details of the competitor.

The following table shows the competitor profile information.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization Name</td>
<td>Name of the competitor.</td>
</tr>
<tr>
<td>Name Suffix</td>
<td>Value appended to the name of the Organization Name for the competitor.</td>
</tr>
<tr>
<td>Chief Executive Name</td>
<td>Name of the competitor company’s chief executive officer or highest-level employee.</td>
</tr>
<tr>
<td>Line of Business</td>
<td>Line of business of the competitor company’s products.</td>
</tr>
<tr>
<td>D-U-N-S Number</td>
<td>Dun &amp; Bradstreet unique nine-digit identification number for the competitor company.</td>
</tr>
<tr>
<td>Organization Size</td>
<td>Size of the competitor company.</td>
</tr>
<tr>
<td>Year Established</td>
<td>Year the competitor company was first started.</td>
</tr>
<tr>
<td>Threat Level</td>
<td>Perceived threat level of the competitor in closing deals, such as low, medium, and high.</td>
</tr>
<tr>
<td>Year Incorporated</td>
<td>Year the competitor company was first incorporated.</td>
</tr>
<tr>
<td>Stock Symbol</td>
<td>Stock symbol for the competitor company in the financial markets.</td>
</tr>
<tr>
<td>Fiscal Year End Month</td>
<td>Month that the competitor company closes its fiscal year.</td>
</tr>
<tr>
<td>D&amp;B Credit Rating</td>
<td>Credit rating of the competitor company with Dun &amp; Bradstreet.</td>
</tr>
<tr>
<td>Privately Owned</td>
<td>Indicates the competitor company is privately owned.</td>
</tr>
<tr>
<td>Minority Owned</td>
<td>Indicates that the competitor company is minority owned.</td>
</tr>
<tr>
<td>Small Business</td>
<td>Indicates that the competitor company is a small business.</td>
</tr>
<tr>
<td>Status</td>
<td>Status of the competitor record, either active or inactive.</td>
</tr>
</tbody>
</table>

The following table shows the information available in the details tabs of the Edit Competitor page.
**Item** | **Description**
--- | ---
SWOT Analysis | Strength, weakness, opportunity, and threat (SWOT) value for a competitor. This analysis helps you understand, plan, and craft an effective competitive strategy when facing a competitive threat on a deal.

Product groups | Product groups the competitor company is associated with. You can associate product groups using the Competitive Presence node in the desktop UI customer pages.

Opportunities | View historical and current opportunities associated with the competitor.

Attachments | Attachments are files, free-form text, or URLs that can give you information that helps you position products or solutions against specific competitors.

Internal Experts | Internal experts are people in your company who are experts on the competitor.

Geographies | Geographies where the competitor company is present.

Industries | Industries where the competitor competes with your company.

You can also view revenue at stake for the competitor. The Revenue at Stake area in the Edit Competitor page shows the revenue that potentially could be lost to the competitor. The data comes from product or product group revenue on the opportunities where the customer is present.

Additionally, you can view notes associated with the competitor, if entered by the administrator. Notes are stored in the contextual area of the Edit Competitor page.

**Associating Competitors with Opportunities: Procedures**

You can associate competitor companies with opportunities in order to capture the competitive information for a deal. You can associate competitors at the opportunity level and additionally at the product-line level.

**Associating a Competitor at the Opportunity Level**

Use the following procedure to add a competitor at the opportunity level.

1. Sign in as a sales user, such as a salesperson or sales manager.
2. Navigate to **Sales - Opportunities**.

   The list of opportunities displays.

3. Click the name of an opportunity to edit it.
4. In the Primary Competitor values, click Search.
5. Search for and select a competitor.
6. Click OK.
7. Save your changes.

   To change the primary competitor, repeat this procedure.
Associating a Competitor at the Product-Line Level

Use the following procedure to associate a competitor at the product-line level on an opportunity.

Prerequisites:

- More than one competitor must be set up in the application. Competitors are set up by the administrator.
- The administrator must have enabled the Competitor field in the Products table using customization.
- In order for a competitor to be selectable in the Competitor list of values in the Products table, it must first have been associated with the opportunity at the opportunity level. Competitors won’t show up in the list of values in the Products table unless they were first added to the opportunity at the header level.

1. Sign in as a sales user, such as a salesperson or sales manager.
2. Navigate to Sales - Opportunities.
   The list of opportunities displays.
3. Click the name of an opportunity to edit it.
4. In the Primary Competitor list, click Search.
5. Search for and select a competitor.
6. Click OK.
7. Save your changes.
8. Add a product line to the table.
9. In the Competitor list of values, select a competitor.
10. Save your changes.
11. Repeat this procedure to add additional competitors.

Associating Competitors with Product Groups: Procedure

You can associate competitors with product groups, if the functionality is enabled, in the desktop UI customer center pages. You use the Competitive Presence node to access the pages where you associate the product groups with a competitor. After you associate a competitor with an product group, the product group shows up as associated with that competitor in the competitor's profile screens.

Use the following procedure.

1. Sign in as a sales user, such as a sales representative or sales manager. Or, sign in as a sales administrator.
2. Navigate to Sales - Accounts.
   The list of accounts displays.
3. Select an account.
   The Edit Account page appears.
4. From the Actions menu, select More Details.
   The Edit Account page appears.
   
   **Note:** If you do not have the More Details option available in the Actions menu, then the desktop UI customer center pages have not been enabled.

5. Click the Competitive Presence node in the Edit Account page.
   The Competitive Presence page appears for the account, showing the available catalogs on the left and the product groups on the right.
6. Select a catalog.
7. In the list of product groups, select a product group and then select the competitor you want to associate with the product group.
8. Optionally, enter any lost revenue you want to associate with the product group.
9. Save your changes.
10. In the Edit Competitor page, in the Product Groups tab, the product groups now show up as associated with the competitor.

Related Topics
- Sales Competitors: Overview

Assigning Opportunities

How are territories assigned to opportunities?

You can't explicitly add territories to an opportunity. Rather, the assignment engine automatically assigns territories to opportunity product lines by matching the dimensional attributes of product lines to territory dimensions, such as Customer Size or Industry.

When the assignment engine assigns territories to opportunity product lines, the territory owner is also copied to the opportunity team.

Profile options set by the administrator determine the following:

- Whether, when a territory is assigned to an opportunity product line, all territory team members are also copied to the opportunity team, in addition to the territory owner.
- Whether the assign opportunity action is available from within an opportunity for salespeople to run assignment.
- Whether the application runs assignment when salespeople save an opportunity.

Note: With partner integration, partner territories (territories whose sales channel dimension is equal to Partner) are not assigned to product lines. Partner organizations can only be associated with an opportunity manually, or they can be automatically associated through an approved lead registration.

Related Topics
- What's assignment manager?
- Opportunity Team Assignment: Explained
- Sales Account Assignment Object: Explained

Adding Opportunity Team Members

Watch: This tutorial shows you how you can use Oracle Sales Cloud to easily add team members to an opportunity.
How do I assign team members automatically to an opportunity?

While editing an opportunity, from the Actions menu, select Save and Run Assignment.
You must have Full access to the opportunity to see the Save and Run Assignment action.

Tip: You can view assigned territories and the associated territory team members on the opportunity team in the opportunity Team pages.

Why can't I assign an opportunity?

You must have Full permission on an opportunity to see the Save and Run Assignment action.
Note that a profile option determines whether the assignment action is available in opportunities.

What's lock assignment?

Lock assignment prevents a salesperson from being automatically removed from an opportunity through the assignment engine. Only users with Full access on the opportunity can check or deselect the Lock Assignment check box for sales team members.

What's deal protection?

With the deal protection feature, all salespeople are automatically protected from being removed from a product line for which they are receiving sales credit, or from the opportunity team, when territory realignment happens. Deal protection applies to sales resources that get automatically assigned to product lines as credit recipients or to the opportunity team using territory-based assignment.

A profile option set by the administrator specifies the default number of days for which salespeople are protected. An opportunity team member with Full access level can override the dates for which the protection is active.

Closing Opportunities

Closing an Opportunity: Explained

You can close opportunities as needed, for example, when they are won, lost, or no longer active.
When closing an opportunity, you may be required to enter a win/loss reason and a competitor, if enabled during setup.
There are three ways to close an opportunity:

- In the simplified UI, use the edit opportunity UI: See the topic, Closing an Opportunity Using Edit Opportunity UI, for more information.
- In the desktop UI, use the close opportunity UI: See the topic, Closing an Opportunity Using the Close Opportunity UI, for more information.
- In the desktop UI, use the mass update feature: See the topic, Closing Multiple Opportunities, for more information.

Closing an Opportunity Using the Close Opportunity UI

If the Close Opportunity page has been enabled by the administrator, you must use it to close an opportunity.

Closing an Opportunity Using the Close Opportunity Page

Use the following procedure to close an opportunity using the Close Opportunity page.

The Close Opportunity page is only available in the desktop UI.

1. From the Navigator, click Opportunities.
2. In the list of opportunities, edit the opportunity you want to close. The Edit Opportunity page appears.
4. In the Close Opportunity page, in the Status field, select a status that belongs to a Closed status category. For example, select Won.

   The Close Date field changes to the current date.

   The Win/Loss Reason field becomes active.

   ✍️ Note: The Win/Loss Reason and Competitor fields may or may not be required to be filled out, depending upon how the administrator has configured the close opportunity behavior.

5. Select a Win/Loss Reason. For each product line where this field is not defined, the application automatically synchronizes it with the header value.
6. Select a Competitor. For each product line where this field is not defined, the application automatically synchronizes it with the header value.
The following figure shows an example of the Close Opportunity page.

7. Click **OK**.
   The application returns to the Edit Opportunity page.
8. Click **Save** or **Save and Close**.

**Closing an Opportunity Using the Edit Opportunity UI**

You can use the Edit Opportunity page to close an opportunity by setting its status to one of the closed status categories and entering any required information.

If a dedicated close page has not been enabled by the administrator, then you use the Edit Opportunity page to close an opportunity. If a dedicated close page has been enabled, then when you attempt to close an opportunity, the Close Opportunity page appears, where you enter the same information you enter while closing in the Edit Opportunity page. The dedicated close page is available only in the desktop UI.

**Closing an Opportunity Using the Edit Opportunity Page**

Use the following procedure to close an opportunity from the Edit Opportunity page.

1. Sign in as a salesperson and navigate to **Sales - Opportunities**.
   The opportunity landing page displays the list of your opportunities.
2. Find an opportunity and edit it.
3. From the **Status** field, select a status that belongs to a Closed status category. For example, select **Won**.
   The **Close Date** field changes to the current date.
The **Win/Loss Reason** field becomes active.

**Note:** The Win/Loss Reason and Competitor fields may or may not be required to be filled out, depending upon how the administrator has configured the closing behavior.

4. Select a **Win/Loss Reason**, if required.
5. Select a **Competitor**.

The following figure shows an example of the fields involved in closing an opportunity in the Edit Opportunity page.

6. Click **Save** or **Save and Close**.

**Tip:** You can find closed opportunities by searching for them using the search utility.

### Closing Multiple Opportunities

You can multiselect opportunities in the opportunity list and close them at once.

You must have Full or Edit access to the opportunities to mass update them.

#### Closing Multiple Opportunities at Once

Use the following procedure to close multiple opportunities at once. This procedure is available in the desktop UI only.

**Note:** If Competitor is a required field in the close opportunity flow, the opportunities you mass update must already have competitors associated with them before you attempt to mass update them.

1. From the Navigator, click **Opportunities**.
2. In the list of opportunities, multiselect the opportunities you want to close. To select multiple opportunities, hold the **Ctrl** key down as you select them.
3. From the Actions menu, select **Perform Mass Update**. The Mass Update dialog box appears.
4. Click the check box next to the **Status** field to activate it.
5. From the **Status** field, select a status that belongs to a Closed status category. For example, select Won.
6. Enter a Win/Loss Reason, if enabled as required by your administrator.
7. Click **Save and Close**. The opportunities you updated are now closed.
The following figure shows an example of the Mass Update dialog box.

![Mass Update Dialog Box](image)

**Related Topics**
- Synchronization of Opportunity and Product Line Attributes: Explained

**Using Opportunity Search Close Period and Close Date Range Fields: Explained**

The opportunity search fields Close Period and Close Date Range can be used together or separately.

Use the **Close Period** field to set the calendar period for the opportunity close date. Predefined values are Current Quarter, Previous Quarter, Next Quarter, Previous and Current Quarter, Current and Next Quarter. When you set a value in this field, the **Close Date Range** field automatically changes to the dates for the calendar period.

To use the Close Date Range separately, enter your own **Close Date Range** values instead. When you do, the application clears the **Close Period** list so that it displays nothing.

**Examples of Field Actions**

Following is an example of the Close Date Range and Close Date fields working together:

- The CRM calendar is defined as:
  - Q1 2014 - January 1 to March 31
  - Q2 2014 - April 1 to June 30

- In January 2014, you select **Current Quarter** in the Close Period field.
  - The application sets the default Close Date range as **01/31/2013 to 3/31/2013**.
Following is an example of using the Close Date field by itself:

- You want to review opportunities for a five-month range: March 1 through July 31, 2014.
- In the Close Date fields, you select 03/1/2014 to 7/31/2014.
- The application clears the Close Period field and retrieves opportunities whose close date falls within the date range.

Performing Assessments

Performing an Opportunity Assessment: Procedure

Opportunity assessments let you evaluate the health of an opportunity. Assessments contain a series of questions and responses. After you answer the assessment questions and submit the assessment, the application returns a rating score and feedback that can help you better pursue the opportunity and increase the chance of winning the deal.

For example, you complete an assessment intended to determine whether an opportunity is healthy enough to offer the customer a 15 percent discount. Based on the assessment score, you and your manager determine whether the opportunity qualifies for the discount. Giving a discount increases the chance of winning the deal.

Assessments Available for Sales Stages

Assessments are enabled for a specific opportunity sales stage within the sales method being used on the opportunity. Assessments available in one sales stage may not be available in another sales stage.

Performing a New Assessment

Use the following procedure to perform a new opportunity assessment.

> Note: You must have Full or Edit access on an opportunity to perform new assessments and update existing assessments. With View Only access, you can view assessments but not update them.

1. From the Navigator, click Opportunities.
2. In the list of opportunities, select an opportunity to edit it. The Edit Opportunity page appears.
3. Click the Assessments tab to open the Assessments page. Note the following behavior:
   - If only one assessment is available, it displays in the Assessments page, ready for entry.
   - If multiple assessments are available, the most recently created (by the administrator) assessment displays. You can use the Show list of values to select other assessments.
   - You can add assessments, provided more are available, by clicking Add Assessment and then selecting the assessment. The Add Assessment button displays only if multiple assessments are available.

   After you submit an assessment, you cannot revise it.

Updating an In-Progress Assessment

Use the following procedure to update an assessment that’s in progress.

1. From the Navigator, click Opportunities.
2. In the list of opportunities, select an opportunity to edit it. The Edit Opportunity page appears.
3. Click the **Assessments** tab to open the Assessments page.

4. To retrieve the assessment you have in progress, click the **Show** list of values and select the assessment from the list. Note that the assessment that was worked on last is the one that will appear by default in the Assessment tab.

**Deleting Assessments**

Your administrator may have enabled the Delete Assessment button in the Assessments page. The delete action lets you delete an existing assessment. After you delete an assessment, it’s available to rerun using the Add Assessment button. Note that you must have Full or Edit access on the opportunity to delete an assessment.

**Understanding Integrations with Other Applications**

Why can't I see the Partners tab and Primary Partner field when I edit an opportunity?

You need specific user roles to see partner functionality in opportunities. Contact your administrator for more details.

*Note:* If administrators removed some fields from the opportunity page layout, then you won’t see the Partners tab and the Primary Partner field in opportunities even if you have the correct user roles.
9 Managing Opportunity Products and Revenue

Opportunity Products and Revenue: Overview

Salespeople typically add product groups or products to opportunities to record potential sales revenue while working the deal. After an opportunity is won and closed, the revenue from the products sold becomes actual revenue, for reporting purposes. Companies use opportunity revenue information for several reasons, such as analyzing sales pipelines and win/loss trends, monitoring the performance of salespeople, and generating revenue forecasts.

The following are typical tasks that a salesperson performs with opportunity products and revenue:

- Add products and product groups that the customer is interested in.
- Set product line revenue attributes, such as revenue amount, price, and quantity.
- Set other product line attributes, such as inclusion in the forecast, expected close date, win probability, and competitors.
- Enter and maintain recurring revenue schedules, such as those for subscription services or training plans.
- Allocate and manage sales credit amounts that opportunity team members receive.
- Run assignment in order to assign salespeople to the product lines.

Working with Opportunity Products

Adding Opportunity Products and Revenue

Watch: This tutorial shows you how you can use Oracle Sales Cloud to easily add products to opportunities so the potential revenue is accurately reflected in your pipeline and forecast.

Managing Opportunity Products and Revenue: Procedures

You can add products or product groups to opportunities and then update the product lines, including revenue attributes, as needed.

Note: For procedures on managing recurring opportunity products or product groups that are part of a subscription business model, see the topic, Working with Recurring Opportunity Products: Procedures.
Adding Products or Product Groups

Use the following procedure to add a product or product group to an opportunity.

1. Sign in to the application as a user with access to opportunities, such as a salesperson or sales manager.
2. Navigate to **Sales - Opportunities**.

   The opportunity landing page displays your opportunities.

3. Find an opportunity and edit it. Or, create an opportunity and save and edit it.
4. In the Products region, click **Add** to add a row to the table.
5. In the **Type** field, select **Group** if you are adding a product group. Select **Product** if you are adding a single product.

   **Note:** Depending on your implementation, you may have the option to browse the sales catalog. The catalog contains the same product groups and products as those accessible from the table.

6. Select the **Name** list, and then select the product group or product.

   If the product group or product if it is not in the recently used items list, access the search page by clicking the **Search** link in the **Name** list.

7. In the Search page, the product groups or products you have access to may be automatically filtered to show only the products in your sales territories. To search all products in the database without the territory filtering, deselect the **Filter by Territory** option.

8. Select the product group or product and click **OK** to return to the Products table, where you can set other attributes of the product line, such as quantity, price, and so forth.

9. Save your work.

The following table explains the product line attributes.

<table>
<thead>
<tr>
<th>Product Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Select either product group or product.</td>
</tr>
<tr>
<td>Name</td>
<td>Use to select a product or product group. If individual products are not implemented, then only product groups are available.</td>
</tr>
<tr>
<td>Quantity</td>
<td>Enter values in whole numbers. The application multiplies this field by Estimated Price to calculate the revenue amount.</td>
</tr>
<tr>
<td>Estimated Price</td>
<td>Enter estimated price per item. The application multiplies this field by Quantity to calculate the revenue amount.</td>
</tr>
<tr>
<td>Amount</td>
<td>Amount used in forecasting and for reporting. The application calculated this field from price multiplied by quantity, but you can override the value.</td>
</tr>
<tr>
<td>Currency</td>
<td>The initial value is based on the opportunity-level currency. If multiple currencies are implemented, you can pick a different currency.</td>
</tr>
<tr>
<td>Sales Credit</td>
<td>Use sales credits to specify who gets revenue and overlay sales credit for the sale.</td>
</tr>
</tbody>
</table>

Depending upon how your application is configured, you may have the following additional product line attributes available.
<table>
<thead>
<tr>
<th>Product Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close Date</td>
<td>Indicates the expected close date of the product line. The initial value is the opportunity-level close date, but each line can have its own close date.</td>
</tr>
<tr>
<td>Forecast</td>
<td>Displays a check mark if the product line matches the established forecast criteria.</td>
</tr>
<tr>
<td>UOM (Unit of Measure)</td>
<td>The initial value is based on the product or product group selected.</td>
</tr>
<tr>
<td>Status</td>
<td>Use to set the product line status, such as Open or Won.</td>
</tr>
<tr>
<td>Win Probability</td>
<td>The initial value is the opportunity-level win probability, but can be overridden.</td>
</tr>
<tr>
<td>Best Case</td>
<td>The initial value is the revenue amount for the item or group (providing Revenue is greater than Best Case).</td>
</tr>
<tr>
<td>Worst Case</td>
<td>Use to set a worst case revenue amount.</td>
</tr>
<tr>
<td>Include in Forecast</td>
<td>The application sets the initial value to <strong>When matches forecast</strong>, if forecasting criteria have been enabled. Can be overridden to <strong>Yes</strong> (meaning always include in forecast) or <strong>No</strong> (meaning never include in forecast), if forecasting criteria override has been enabled.</td>
</tr>
<tr>
<td>Territories</td>
<td>Displays the territories assigned to the product lines. You can drill down into the field to view all of the associated territories.</td>
</tr>
<tr>
<td>Competitor</td>
<td>You can set a competitor at product-line level. The choice list is limited to those associated at the opportunity level. Depending upon your implementation, you may be required to enter a competitor when setting an opportunity or product line to closed.</td>
</tr>
<tr>
<td>Win/Loss Reason</td>
<td>When a product line or the opportunity is closed, this field indicates why the product line was won or lost.</td>
</tr>
<tr>
<td>Actual Close Date</td>
<td>This is a read-only field set by the application automatically when you set a product line to a closed status.</td>
</tr>
</tbody>
</table>

**Removing Product Lines**

You can remove any unneeded products from the Products table in opportunities using the following procedure.

1. Sign in to the application as a user with access to opportunities, such as a salesperson or sales manager.
2. Navigate to **Sales - Opportunities**.
3. Find an opportunity and edit it. Or, create an opportunity and save and edit it.
4. In the Products region, click the **delete** in the applicable table row.
5. Save your work.

**Managing Recurring Products**
Recurring Opportunity Products: Overview

Recurring schedules in opportunities let sales representatives enter and track opportunity products or product groups that are part of a subscription business model.

The subscription business model applies to the sale of goods, software, or services where the customer is required to pay a subscription price for access to the goods, software, or services, with additional usage or pay-as-you-go charges in some cases. Some examples are:

- Data and phone services
- Credit collection or payment processing services
- Software, platform, or data-as-a-service costs
- Magazine subscriptions
- Product life cycle costs
- Engineering and infrastructure services

The subscription model can encompass both business-to-business (B2B) and business-to-consumer (B2C) customers. For example, a telecommunications company may sell mobile phone services to individuals, and multiple phone lines to a business for their employees. The supplier of these services typically charges the customer a periodic rate applicable to the plan that they subscribed to.

After a sales representative defines a schedule for a subscription product or service, the application automatically creates the recurring transactions from the frequency and the number of transactions specified in the schedule. There are several time frequencies to choose from, such as weekly, monthly, quarterly, yearly, and so on. The multiple frequencies make it easy to set up a recurring schedule, like a monthly subscription for three years, or a biweekly annual subscription. Sales representatives can review the automatically-created schedule and quickly add a one-time registration or installation fee, and adjust the amount or date of any transaction.

Subscription changes are easy to manage. If there is a change in the terms or price of the subscription, sales representatives can quickly define a new schedule to replace the previous one. If the original subscription is extended, say, for another year, sales representatives can easily extend the existing schedule on the product for the desired period.

Product amounts from recurring schedules are summed into the corresponding quarterly or yearly periods, and are readily available in pipeline reports and forecast rollups for sales representatives and sales managers.

Managing Recurring Revenue

Watch: This tutorial shows you how you can use Oracle Sales Cloud to easily manage recurring revenue on opportunities.

Working with Recurring Opportunity Products: Procedures

You use recurring transactions to enter and track opportunity products or product groups that are part of a subscription business model. Use the procedures in this topic to create and maintain recurring revenue schedules in opportunities.

Note: Recurring opportunities functionality is available only if your administrator has enabled it.
Creating a Recurring Revenue Schedule

Use the following procedure to create a recurring revenue schedule for a product or product group in the opportunities UI.

1. Sign in as a sales user, such as a sales representative or sales manager.
2. Navigate to Sales - Opportunities.
   
   The opportunity landing page displays your opportunities.

3. Edit an opportunity by clicking on the name in the list. Or, create an opportunity and save and edit it.
4. In the Products table, click the Add button and enter the details about the product or product group.
5. In the Schedule column, click the add icon (plus sign). The Set Schedule page appears.

Enter data into the fields, using the guidance in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Guidance</th>
</tr>
</thead>
</table>
| Frequency | Select a frequency that the revenue should be generated for. Note that:  
  ◦ Bi-Weekly is twice a month (every two weeks)  
  ◦ Bi-Monthly is every other month |
| Start Date| The default date is opportunity close date.  
  ◦ You can update the field to any other value (equal to or later than current date). |
| End By    | Enter the number of transactions or a calendar end date. |
| Quantity  | Enter quantity of the product or product group being sold, as a whole number. |
| Amount    | Enter the amount of the product or product group being sold. |

6. Click Next. The Manage Schedule page appears. Note the following behavior:
   
   ◦ The appropriate number of transactions are created based on frequency, start date, and number of transactions or end date.
   ◦ The close date on each transaction is set to a value derived from the combination of frequency, start date, and end date.
   ◦ Quantity and amount are repeated for each transaction.
   ◦ Other values (like status, win probability percent, product, and currency) are cascaded from the parent revenue line.
   ◦ Transactions are ordered by ascending close date by default.
   ◦ Total quantity and amount are displayed for the schedule. Total amount shows the applicable currency symbol of the product currency.

7. Review the transactions in the schedule and adjust as needed.

   You can add a schedule transaction row by clicking the Add button and entering the required information.

8. Click OK to save the schedule. The application returns to the edit opportunity page.

9. Click Save or Save and Close to save the changes.
Managing Scheduled Transactions

All other of the other actions you can perform with an existing recurring schedule are done in the Manage Schedule page, available by editing the schedule.

You can:

- Edit the existing transactions in the schedule.
- Extend the schedule by entering new dates.
- Replace the schedule altogether.
- Delete the schedule.

Use the following procedure.

1. Sign in as a sales end user, such as a sales representative or sales manager.
2. Navigate to Sales - Opportunities.
   The opportunity landing page displays your opportunities.
3. Edit an opportunity by clicking on the name in the list.
4. In the Products table, click the edit icon in the Schedule column. The Manage Schedule page appears.
5. In the Manage Schedule page, perform, as needed, the actions in the following table.

<table>
<thead>
<tr>
<th>Action</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit schedule transactions</td>
<td>To add a row to the transactions table, click the Add button and enter the required information. o To remove a row in the transactions table, click the X in the row.</td>
</tr>
<tr>
<td>Replace a schedule</td>
<td>Click the Replace Schedule button. o The Replace Schedule page behaves as if you are creating a new schedule. o Enter the new schedule details and save. The new schedule replaces the old schedule.</td>
</tr>
<tr>
<td>Extend a schedule</td>
<td>Click the Extend Schedule button to retrieve the Extend Schedule page. o Edit the schedule details as needed.  o Note the following behavior:  • If the previous schedule had the number of occurrences stored, then that value is set as the default value.  • The recurring quantity and recurring amount are set by default, based on previous values. If you update these to any other values, the resulting transactions are generated based on the updated values.  • If the start date of the new schedule is prior to the end of current schedule then the application will replace all existing transactions with a close date later than the new schedule’s start date.</td>
</tr>
<tr>
<td>Delete a schedule</td>
<td>Click the Delete Schedule button. o Respond with Yes to the warning message. o All underlying scheduled transactions are deleted, and the schedule parameters on the parent line are removed. o The product line is converted to a standard revenue line and the quantity and amount field are set to blank.</td>
</tr>
</tbody>
</table>

6. Click Save or Save and Close in the edit opportunity page to commit the changes made in the recurring schedules page.
Managing Sales Credits

Sales Credits: Overview

Companies use sales credits to report on salesperson performance and quota attainment, to aid in compensation calculation, and to facilitate forecasting by territories. Sales credit recipients and revenue amounts roll up the resource hierarchy for pipeline reporting and quota attainment.

You assign sales credits to sales resources (salespeople or other sales users) while editing product lines in opportunities. When a product line is first added to an opportunity, the application sets the user who added it as the sole sales credit recipient, receiving 100 percent of the sales credit.

There are two types of sales credit in opportunities:

- Revenue sales credit: Typically allocated to salespeople working the deal.
- Overlay sales credit: Typically allocated to other resources helping out with the deal, such as a product or market specialist. Overlay sales credit is also known as nonrevenue sales credit.

Revenue Sales Credit

When assigning revenue sales credits, keep in mind:

- Only internal resources are eligible as revenue credit recipients.
- Revenue sales credits must add up to 100 percent.
- The Forecast Territory can be set to any territory assigned to the product line with Revenue or Revenue and Nonrevenue Forecast Participation.

Overlay Sales Credit

When assigning overlay sales credits, keep in mind:

- Both internal and external (for example, partner) resources are eligible as nonrevenue credit recipients.
- Nonrevenue sales credits do not need to add up to 100 percent.
- If the selected Allocation Style is Proportional to Revenue, the sales credit amounts adjust automatically and proportionally when the product line amount changes.
- If the selected Allocation Style is Ad Hoc Amounts the sales credit amounts do not change with product line amount changes.
- The Forecast Territory can be set to any territory assigned to the product line with Revenue or Revenue and Nonrevenue Forecast Participation.

Note: Territories with a Forecast Participation of Nonforecast are not eligible to be set as the forecast territory on either revenue or nonrevenue sales credits.
Customizing Default Assignment

You can customize the revenue territory assignment defaulting logic to meet your specific business needs for reporting and forecasting the product amounts on an opportunity. See the article, Customizing Credit Recipients and Forecast Territories Assignment (Doc. ID 2089301.1), available on My Oracle Support (support.oracle.com).

Manual Territory Assignment by Administrators

In the sales credits screens, sales administrators can manually assign a sales representative’s territory to a product line when the territory has not been assigned automatically. Manual assignment allows sales personnel to forecast an opportunity immediately while the territory setup is being reviewed and updated.

Related Topics
- Sales Credit Recipient and Forecast Territory Defaulting Logic: Explained
- Deal Protection on Opportunities: Explained

Allocating Sales Credits: Procedures

Your company can use sales credits to report on salesperson performance and quota attainment, to aid in compensation calculation, and to facilitate forecasting by territories. Sales credit recipients and revenue amounts roll up the resource hierarchy for pipeline reporting and quota attainment.

When a product line is first added to an opportunity, the application sets the user who added it as the sole revenue sales credit recipient (receiving 100 percent of the sales credit). For each product line, you can assign a portion or all of the sales credit from the product revenue to individual salespeople.

Note: You must have Full access to an opportunity to be able to assign sales credits.

Allocating Revenue Sales Credit

You typically allocate revenue sales credit to salespeople working the deal.

Use the following procedure:

1. Sign in as a salesperson or sales manager and navigate to **Sales - Opportunities**. The opportunity landing page displays the list of your opportunities.
2. Find an opportunity and edit it. Or, create, save, and edit an opportunity and then add a product line to it.
3. In the Edit Opportunity page Products table, click the edit icon in the **Sales Credit** column for the line you’re editing. The Edit Sales Credit window appears.
4. Click the **Add Revenue Credit** button to add another row to the sales credits table.
5. Select the drop-down list in the **Name** column for the new row. Select a name from the recently used list, or click **Search** to search for the salesperson.
   a. If searching, in the Select: Owner page, enter the search criteria for the user you want to allocate sales credit to.
   b. In the search results, select the user and click OK.
6. In the table, enter the percent of sales credit for the user or an amount. With revenue sales credit, the total of all percentages entered must add up to 100 percent.
7. Optionally, in the **Forecast Territory** column, pick a territory to forecast the revenue in. The Forecast Territory can be set to any territory assigned to the product line with Revenue or Revenue and Nonrevenue Forecast Participation. The forecast territory is set automatically when the assignment process runs, so you can skip this step if you want to.
8. When you’re finished setting the sales credit, click OK.
9. In the Edit Opportunity page, save your changes.

Allocating Overlay Sales Credit

You typically allocate overlay sales credit, or nonrevenue credit, to other resources helping out with the deal, such as a product or market specialist.

Use the following procedure:

1. Sign in as a salesperson and navigate to Sales - Opportunities.
   The opportunity landing page displays the list of your opportunities.
2. Find an opportunity and edit it. Or, create, save, and edit an opportunity and then add a product line to it.
3. In the Edit Opportunity page Products table, click the edit icon in the Sales Credit column for the line you’re editing.
   The Edit Sales Credit window appears.
4. Decide which type of overlay credit you want to enter and then select that type from the Allocation Style list of values:
   - **Proportional to Revenue**: With this type, the sales credit amounts adjust automatically and proportionally when the revenue item amount changes.
   - **Ad Hoc Amounts**: With this type, the sales credit amounts do not change with revenue item amount changes.
5. Click the Add Overlay Credit button to add another row to the sales credits table.
6. Select the drop-down list in the Name column for the new row. Select a name from the recently used list, or click Search to search for the salesperson.
   a. If searching, in the Select: Owner page, enter the search criteria for the user you want to allocate sales credit to.
   b. In the search results, select the user and click OK.
7. In the Edit Sales Credit window, in the Sales Credit column of the table, enter the percent of sales credit for the user. With overlay sales credit, the total of all percentages do not need to add up to 100 percent.
8. Optionally, in the Forecast Territory column, pick a territory to forecast the revenue in. The Forecast Territory can be set to any territory assigned to the product line with Revenue or Revenue and Nonrevenue Forecast Participation. The forecast territory is set automatically when the assignment process runs, so you can skip this step if you want to.
9. When you’re finished setting the sales credit, click OK.
10. In the Edit Opportunity page, save your changes.

**Related Topics**

- What’s deal protection?

**How can I lock in a sales credit recipient?**

When assigning sales credits, you can lock the sales credit recipients of a revenue line by setting the corresponding Lock Credit Owner check box on the line. This setting prevents the recipient from automatic replacement when assignment is run.

Generally, you don’t need to lock resources who are members of a forecast territory on the sales credit. However, you should consider locking ad hoc resources or non-territory-based recipients, such as partner resources, to prevent automatic assignment from removing them as credit recipients.
Related Topics

- Sales Credit Recipient and Forecast Territory Defaulting Logic: Explained

Understanding Product Attribute Synchronization

Product Line Syncing with Opportunity Win Probability: Example

When you change the win probably percentage on an opportunity, the application automatically resynchronizes any product lines whose win probability percentages were previously in sync with the opportunity win probability.

Scenario

The following example illustrates the behavior:

- Opportunity win probability is 50%.
- Product line 1 win probability is 50%.
- Product line 2 win probability is 50%.
- Product line 3 win probability is 40%.

You change the opportunity win probability to 60%. The application automatically changes the win probability for product lines 1 and 2 to 60% as well, because they were previously in sync with the opportunity-level win probability.

The win probability for product line 3 doesn’t change, because it was not previously in sync with the opportunity-level win probability.

Related Topics

- What happens if I change win probability?

Synchronization of Opportunity and Product Line Attributes: Explained

Opportunities and their product lines share common attributes, for example, status or win probability percentage. For several attributes, under certain conditions, the application automatically synchronizes them so that they are the same. In addition, the application updates certain opportunity and product line attributes based on the values of other attributes.

The attributes that the application synchronizes or updates automatically are:

- Win probability
- Close date
- Include in forecast setting
- Status
- Win/loss reason
- Competitor
An attribute is said to be in sync if its opportunity and product line values are the same, and if the product line is in the same status category as its opportunity. If a product line and its opportunity both have undefined values, they are considered to have the same value.

Opportunity and Product Line Attribute Synchronization
The application synchronizes certain product line attributes based on the opportunity-level attribute, under certain conditions. Synchronization occurs for the following attributes:

- Win probability
- Close date
- Include in forecast setting
- Status (not status category)

Consider the following example of close date synchronization:

- An opportunity with an Open status category has a close date of July 14, 2015.
- Product lines 1, 2, and 3 have the same close date and they are in the same status category.
- Product line 4 has a different close date, but the same status category.
- The close date of the opportunity is changed to August 14, 2015. The application automatically sets the close dates of product lines 1, 2, and 3 to the same close date as that of the opportunity. The close date of product line 4 remains unchanged, because it has close date that was not already in sync with that of the opportunity.

Opportunity Status Updates
The following scenarios explain the behavior when opportunity status is updated:

- Opportunity status is updated to a Won status:
  - The application updates the opportunity win probability to 100 percent. It also updates all in-sync product lines' win probability to 100 percent.

- Opportunity status is updated to a Lost or No Sale status:
  - The application updates the opportunity close date to the current date. It does not update the close date on in sync product lines.

- Opportunity status is updated from an Open status to a Closed status:
  - The application enables the opportunity win/loss reason attribute.
  - If an opportunity primary competitor has been defined, the application updates the product line competitor to the opportunity primary competitor for all opportunity product lines, if they are not already defined. This behavior applies only to the close opportunity and mass update opportunities flows.

- Opportunity status is updated from a Closed status to an Open status:
  - The application disables the opportunity win/loss reason attribute.
  - The application sets the opportunity win/loss reason attribute to “undefined”. It does not update the win/loss reason on in-sync product lines.

Product Line Status Updates
The following scenarios explain the behavior when product line status is updated:

- Product line status is updated to a Won status: The application sets the product line win probability to 100 percent.
• Product line status is updated to a Lost or No Sale status: The application sets the product line close date to the current date.
• Product line status is updated to a Closed status: The application enables the product line win/loss reason attribute.
• Product line status is updated to an Open status:
  o The application disables the product line win/loss reason attribute.
  o The application updates the product line win/loss reason attribute to "undefined".

**Opportunity Win/Loss Reason Updates**

When an opportunity is in an Open status, the opportunity win/loss reason attribute is disabled. Win/loss reason is activated when the opportunity is set to a Closed status. When the opportunity win/loss reason is updated, the application updates all opportunity product lines where the win/loss reason attribute is in sync.

**Opportunity and Product Line Competitor Updates**

If a primary competitor has been defined at the opportunity level, when the opportunity status changes from an Open status to a Closed status, the application updates the product line competitor to the primary competitor for all lines that don’t already have a competitor.

**Tip:** If a product line without a competitor is set to closed and the opportunity is saved, the application displays a dialog box that allows the user to copy the opportunity primary competitor to the product lines without competitors.

This above behavior applies only to edit opportunity and close opportunity flows, not to the mass update flow.

**Related Topics**

• Summary of Opportunity Business Logic: Explained

• Setting Opportunity Revenue Forecast Criteria
Managing Partner Relationships

Partner Relationship Management: Overview

Channel organizations use Oracle Sales Cloud Partner Relationship Management to recruit channel partners and sell products and services through them to grow their business. Both channel organizations and partners use partner management to align their businesses so they can more successfully close deals. Channel organizations also use partner management to analyze partner performance, thus optimizing their time and financial investments in their partners.

Oracle Sales Cloud utilizes streamlined partner relationship management and indirect sales processes to increase the value of your partner network. Channel managers have their own work area to manage Partners, Enrollments, Programs, Marketing Development Funds (MDF), and Partner Announcements. Partner salespeople have their own partner portal, where they can qualify leads, register opportunities, request MDF aid, and view announcements from their channel organization.

How Partner Relationship Management Is Organized

Oracle Sales Cloud partner relationship management functionality is organized in the following areas:

- Partners
- Enrollments
- Programs
- MDF
- Deal Registrations
- Partner Announcements
- Channel Dashboard

Partners

Channel managers can perform overall partner management, including signing up new partners and providing them with portal access, managing all aspects of the partner account, including:

- partner profile information
- partner contacts
- partner teams
- partner leads
- partner deal registrations
- partner opportunities
- partner relationships
- partner business plans and objectives
- partner programs
• partner program enrollments
• MDF
• partner notes
• partner activities

Channel managers have their own dashboard where they can view a wide range of information about each partner, including the leads, opportunities, and deal registrations that each partner generates. As well, partners can access their own partner portal to manage their:

• Partners
• MDF
• Lead Qualifications
• Deal Registrations
• Opportunities
• Activities

Enrollments

A partner program enrollment is the enrollment of a partner in a specific partner program. Active enrollment in partner programs can make partners eligible for benefits and incentives that come with the partner program. Enrollments allow the channel team to track and manage which partner users are taking part in the partner programs offered by the brand owner or channel organization.

Programs

Partner programs are programs that the brand owner or channel organization create to provide benefits to approved partner enrollees. Partner programs help brand owners and other channel organizations to encourage their partners, such as resellers, manufacturers, or distributors to sell their products or services.

Brand owners and other channel organizations define partner programs to segment their partners and provide benefits based on partner competencies and expected revenue from partners. Programs have an eligibility criteria and associated benefits. The partner program describes the requirements and benefits for partners when they are members of the program.

Marketing Development Funds (MDF)

Market Development Funds (MDF) are funds that brand owners make available to partners, so the partners can market the brand owner’s products in specific geographical areas, or so the partners can market the brand in general. MDF allows brand owners to manage the full cycle associated to marketing development funds, from creating and managing MDF budgets to managing MDF requests and claims submitted by partners.

Deal Registrations

Deal registration is the process partners use to request exclusive rights to a deal from their brand owner or channel organization. This process provides partners with the means to inform the brand owner or channel organization about a deal,
and by being first to register that deal, the partners receive priority for the opportunity if their deal registration is approved. Deal registrations are less speculative than leads, but more speculative than opportunities.

Partner Announcements

Brand owners or channel organizations can send announcements that appear on the partner portal home page. These announcements communicate important information that the brand owner or channel sales team want partner users to know.

Channel Dashboard

Oracle Sales Cloud provides a dashboard for channel managers so that are apprised of critical sales and partner activity information, including required action information and detailed reports on one page. The channel dashboard allows channel managers to track their quota versus their actual. The channel dashboard includes key performance indicators for the following:

- Actual revenue versus quota
- Top opportunities
- Stalled opportunities
- Open pipeline revenue
- Partner status
- Partner performance

Managing Partners

Managing Partners: Overview

Channel account managers can create and manage partners using the Oracle Sales Cloud simplified pages. Channel account managers can:

- Create new partner users.
- Review partner profile information, such as name, address, and contact information.
- Build and view lists of their partners.
- See overview information for opportunities, leads, enrollments and activities.
- Edit partner detail information.

Reviewing Partner Overview Information: Explained

Channel account managers can view information about a partner on the partner’s overview page. The partner’s overview page provides the following information:

- Partner type
• Status
• Current opportunities (deals)
• Approved enrollments
• Enrollment requests awaiting approval
• Open activities

**Viewing the Partner Overview Page**

Channel account managers can use these steps to access a partner’s overview page:

1. Sign in with your channel account manager credentials.
2. Click Partners.
3. On your Partners list (landing) page, search for and select the partner you are interested in reviewing.
4. Review the partner information on the overview page.
5. You can click the links on the individual infolets to expand their details.
6. You can navigate back to your Partners list page to select another partner to review.

**Creating New Partner Accounts: Procedure**

Channel account managers can create new partner accounts for their partner company.

**Creating a New Partner Account**

Channel account managers can use these steps to create a new partner account in the channel portal.

1. Sign in with your channel account manager credentials.
2. Click Partners, and click Create Partner.
3. Provide the necessary information about the partner account, such as:
   - Name of the partner account
   - Profile information, such as: partner type, owner, primary contact information, address information, and additional information like geographies served and focus areas.
4. Click Save and Close.

**Editing Partner Information: Procedure**

Channel account managers edit partner information by filtering their list of partners to find and select the partner, then clicking the Edit action.

**Editing Partner Information**

Use the following steps to edit partner information:

1. Sign in with your channel account manager credentials, and click Partners.
2. From your list of partners, search for and select the partner with information you want to edit.
3. Click the partner’s Profile tab.
4. Update the information for the partner.
5. Click Save and Close.
Impersonating a Partner User: Explained

Partner impersonation allows channel managers to see the UI pages and data exactly as the partner user sees them. Partner impersonation is helpful for troubleshooting user complaints about the UI pages or data. Channel Managers do not need the partner user's specific permission to impersonate the partner user.

Impersonating a Partner User

Channel managers can use these steps to impersonate a partner user.

1. Sign in with your channel account manager credentials.
2. Click Partners.
3. Search for and select the partner account where the partner user works.
4. On the partner's Contacts sub tab, search for and select the partner user you want to impersonate.
5. Click Login as User and provide the your channel manager credentials.
6. You can update the following:
   - Accounts
   - Contacts
   - Leads
   - Deal Registrations
   - Opportunities
   - Activities

Note: An audit record tracks all changes made by the channel manager while impersonating the partner user, including the user name of the impersonator and changes made during the impersonation.

Managing Partner Business Plans: Overview

A business plan is a tool that a brand owner or channel company provides to their partners. Business plans describe what the partner’s business goals are and include specific objectives that the partner can follow to meet the business plan goals.

Channel Managers can define business plans for their partner accounts. Partner business plans provide a means of collaboration between brand owners and their partners in defining strategic goals. Business plans allow both brand owners and partners a way to show their commitment to the partnership, and brand owners can use business plans to show their understanding of their partner’s business.

You can add one or more objectives to a partner business plan. These objectives define measurable tactical goals to be achieved by the partner. You can split each objective using one or more of four available dimensions: Time, Product Group, Account, and Geography. By splitting an objective, you can define the targets at a more granular level. For example, you can specify what revenue the partner should reach within the first quarter for a specific product line in a specific geographical region.

Channel managers can create new business plans manually or by copying an existing business plan.
Manually Creating Partner Business Plans and Objectives

Channel managers can use these steps to manually create a partner business plan and add objectives to it.

1. Sign in with your channel manager credentials.
2. From your Partner Management work area, click Partners.
3. From your list of partners, search for and select the partner you want to create a business plan for.
4. On the partner Summary page, click the Business Plans tab.
5. Click Create Business Plan.
6. Provide a name for your business plan.
7. From the Period fields, select the appropriate period for your business plan.
8. If the Owner field is not already populated, select the owner of the business plan.
9. From the Status list, select the status for your business plan.
10. Click Save and Continue.

An Objectives area appears on the Business Plan page.

11. Click Create Objective.
12. Provide a name for the objective.
13. Use the Period fields to set the appropriate period for the objective.
14. From the Type list, select the type for the objective.
15. Depending on your selection from the Type list you see either Quantity or Amount for Unit of Measure, which is a read-only field. If the Unit of Measure is Amount, you must select the currency, such as, USD.
16. If you want to set an objective target, you can enter it in the Target field.
17. Click Save and Continue to open the Objective summary page where you can edit or split the objective, or click Save and Close to save the current objective and add another objective to the business plan.

Creating a New Business Plan by Copying an Existing One

Channel managers can use these steps to create a partner business plan by copying an existing business plan.

1. Sign in with your channel manager credentials.
2. From your Partner Management work area, click Partners.
3. From your list of partners, search for and select the partner you want to create a business plan for.
4. On the partner Summary page, click the Business Plans tab.
5. Search for and select the business plan you want to copy to create your new business plan.
6. From the Actions menu on the Edit Business Plans page, select the Copy action.
7. In the New Business Plan Name field, provide a name for your new business plan.
8. If you want to also copy the objectives to your new business plan, click the Include Objectives check box.
9. Save your work.
Monitoring the Progress of Business Plan Objectives

Channel Account Managers and Channel Sales Managers can use the Analytics tab on the Edit Business Plan page to monitor the progress of a business plan’s objectives.

The Analytics tab is automatically available, but you can optionally hide this tab using Application Composer or Page Composer.

Partners do not have access to this tab.

FAQs for Managing Partners

What partners does selecting My Partners display?
When you select the My Partners list in the Partners work area, the application displays a list of all of the partners where you are listed as the partner owner. You are automatically the partner owner if you created the partner or you can be designated as the owner by an application administrator.

What partner records do the different record sets permit you to search?
The different record sets provided in the Saved Searches window restrict your saved searches to different sets of partners.

The following table lists and describes the record sets for partners.
Tip: To improve saved search performance, restrict your saved searches to smaller record sets. For example, rather than searching all the records you can see, search all the records where you are on the team. Or restrict your searches to a smaller geographical area. For example, search all the partners in one state instead of the whole country.

<table>
<thead>
<tr>
<th>Record Set Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I own</td>
<td>Partners you own. You are the partner owner if you created the partner or if ownership was assigned to you.</td>
</tr>
<tr>
<td>I am on the team</td>
<td>Partners where you are on the partner team. You are on the partner team if you are the partner owner or were added as a member by another team member.</td>
</tr>
<tr>
<td>All records I can see</td>
<td>Partners that you can view based on your partner team membership, sales territory assignments, your position in the organization, and security permissions.</td>
</tr>
</tbody>
</table>

Why can't I see some partner profile attribute values when I create a partner?
The partner profile attributes listed in the following table require you to run the territory dimension synchronization process before you can see their existing or changed values in the UI. The synchronization job updates the data from Lookups to BI and then from BI into the territory dimension tables, so you must run the territory dimension synchronization process to include new lookup values.

The following partner profile attributes read from territory dimensions and require synchronization:

<table>
<thead>
<tr>
<th>Attribute Name</th>
<th>Task Name</th>
<th>Profile Option or Lookup Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner Type</td>
<td>Manage Standard Lookups</td>
<td>ZPM_PARTNER_CHANNEL_TYPE</td>
</tr>
<tr>
<td>Partner Geographies Served</td>
<td>Manage Territory Geographies - the geography structure used by Territory Manager.</td>
<td>N/A</td>
</tr>
<tr>
<td>Partner Industries Served</td>
<td>Manage Profile Options</td>
<td>MOT_INDUSTRY_CLASS_CATEGORY - contains the classification category used for Industries Served dimension.</td>
</tr>
<tr>
<td>Partner Focus Areas</td>
<td>Define Sales Catalog - Manage Product Groups</td>
<td>N/A</td>
</tr>
</tbody>
</table>
Deal Registrations: Overview

Deal registration is the process partners use to request exclusive rights to a deal from their brand owner or channel organization. This process provides partners with the means to inform the brand owner or channel organization about a deal, and by being first to register that deal, the partners receive priority for the opportunity if their deal registration is approved. Deal registrations are less speculative than leads, but more speculative than opportunities.

Channel managers can use simplified Deal Registration pages to more easily manage their deal registrations and partners can register deals using their self-service partner portal.

Partners can register deals using the partner portal. By default, submitted deals are routed to channel sales managers for approval. In turn, channel sales managers can reject or return deal registration requests to partners, asking for additional information and justification. Before approving the deal, the channel sales managers can check for duplicate opportunities to avoid channel conflicts. Once a deal registration is approved, an opportunity is automatically created to track it in the pipeline. Channel managers can decide when to add a partner opportunity in the forecast.

This topic covers the following:

- How Does Deal Registration Work?
- What are the Benefits of Deal Registration?
- Who Does What With Deal Registrations?

How Does Deal Registration Work?

Once a partner identifies a lead, the partner registers it online using simplified Deal Registration pages. The deal registration goes through an approval process with the channel team. Once the channel team approves the deal registration, the partner gets priority for the opportunity and has a set period of time (on a case by case basis) to close the sale. During this time other channel members, or even the brand owner’s own sales team, are not allowed to negotiate a similar deal with that lead. If the time period expires before the partner can close the sale, the channel team can the deal to another partner or to its internal sales team. Typically this is done for extenuating circumstances, such as when the lead requests another partner.

What Are the Benefits of Deal Registration?

Deal registration lowers the chance of channel conflict -- a situation in which channel partners compete against one another, or compete against the brand owner’s or channel organization’s internal sales department. With deal registration, partners can work with a client without having to worry about another company trying to offer the same product at a lower price. Some brand owners and channel organizations also offer to help partners in the selling cycle, and deal registration lowers the chance of the brand owner taking the lead once the partner has brought them into the discussion. Even with deal registration in place, however, a brand owner or channel organization may occasionally give a lead to another partner or to its internal sales team. Typically this is done for extenuating circumstances, such as when the lead requests another partner.

What Are the Roles and Associated Actions With Deal Registrations?

The following table shows the roles and the deal registration actions allowed.

<table>
<thead>
<tr>
<th>Roles</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Partner Sales Representative, Partner Sales Manager, and Partner Administrator</td>
<td>Create a deal registration and submit it for approval.</td>
</tr>
<tr>
<td>Roles</td>
<td>Actions</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Partner Sales Representative, Partner Sales Manager, and Partner Administrator</td>
<td>Withdraw a deal registration in pending approval status.</td>
</tr>
<tr>
<td>Partner Sales Representative and Partner Sales Manager</td>
<td>Edit a deal registration if they are on the team with full or edit access and the deal registration is in draft, return or withdrawn status. The partner attributes on the deal registration become those of the company the partner user belongs to and these attributes cannot be changed by the partner user. However, a channel account manager or channel sales manager can pick or change the partner company when they are creating or editing a deal registration.</td>
</tr>
<tr>
<td>Partner Sales Representative and Partner Sales Manager</td>
<td>View deal registration product details if they are a resource on the deal team and they have view, edit, or full access.</td>
</tr>
<tr>
<td>Partner Sales Representative and Partner Sales Manager</td>
<td>Edit, add, or remove deal registration product details if they are a resource on the deal team with edit or full access, and the deal registration is in Draft, Returned or Withdrawn status.</td>
</tr>
<tr>
<td>Partner Sales Representative and Partner Sales Manager</td>
<td>View deal registration team details if they are a resource on the deal team and they have view, edit, or full access.</td>
</tr>
<tr>
<td>Partner Sales Representative and Partner Sales Manager</td>
<td>Edit deal registration team members if they are a resource on the deal team with edit or full access.</td>
</tr>
<tr>
<td>Partner Sales Representative and Partner Sales Manager</td>
<td>Edit, add, or remove deal registration team members if they are a resource on the deal team and they have full access. Partner users can only add resources that belong to their own partner company.</td>
</tr>
<tr>
<td>Partner Administrator</td>
<td>View or edit all deal registrations belonging to the partner company the administrator works for. Partner Administrators can also view or edit the Team tab and products section.</td>
</tr>
<tr>
<td>Partner Sales Representative, Partner Sales Manager and Partner administrators</td>
<td>Add or modify notes, activities and add team members to the deal team regardless of the status the deal registration is in.</td>
</tr>
<tr>
<td>Channel Sales Manager and Channel Account Manager</td>
<td>Have all the functional privileges as the Partner Sales Representative and Partner Sales Manager. They can also approve, return, or reject a deal registration if they are a designated approver for the deal registration. They can do a duplicate check on the deal registration, they can convert a deal registration to an opportunity, and they can access the social tab.</td>
</tr>
<tr>
<td>Sales Administrator and Channel Operations Manager</td>
<td>Have all the privileges as the Channel Sales Manager, but they have access to all deal registrations in the enterprise. Their update and manage capabilities are restricted based on the deal registration status; however, they can see all deal registrations even if they are not on the sales team or territory.</td>
</tr>
</tbody>
</table>

Managing Partner Deal Registrations: Explained

Channel account managers can use simplified pages in Oracle Sales Cloud to manage deal registrations for their partners. This topic discusses the following:

- Channel Account Manager List Views
• Approving, Rejecting or Returning a Partner Deal Registration
• Resolving Duplicate Partner Deal Registrations
• Partner Deal Registration Approval Information and Approval History Region
• Creating a Partner Deal Registration
• Editing a Partner Deal Registration
• Partner Deal Registration Expiration

Channel Account Manager List Views
Channel account managers use a simplified springboard page for direct access to deal registrations submitted by their partners and to view lists of deal registrations relevant to their role. These lists only display columns pertaining to the tasks channel account managers perform, so they can quickly view and respond to deal registrations awaiting their approval without needing to manually enter a search each time.

Both channel account managers and partners access the Deal Registrations page by clicking the Deal Registrations icon on their desktop. Both channel account managers and partners see the same preconfigured sort for all Deal Registration lists - Submitted Date descending (oldest to newest submissions). Both see the same preconfigured Deal Registrations table column layout. Both see the same preconfigured saved search run on the Deal Registrations page. However, channel account managers can view and edit a deal registration’s details by clicking the deal registration number on their list view, and they can also perform searches using default search attributes, including:

• Partner
• Partner Contact
• Record Set
• Deal Registration Name
• Registration Status
• Submitted Date
• Last Updated Date
• Account Name
• Contact Name
• Opportunity Name
• Deal Expiration Date
• Deal Registration Number

Approving, Rejecting, or Returning a Partner Deal Registration
If the deal registration approval workflow has been configured for the channel account managers to be the approvers, then channel account managers can approve, reject, or return a deal registration. The following table explains what happens when a channel account manager takes each of these actions.

<table>
<thead>
<tr>
<th>Action Taken</th>
<th>What Happens</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approve</td>
<td>If the channel account manager is the last or only approver for the deal registration, the status changes to Approved. The status remains Pending Approval if the channel account manager is not the last approved for the deal registration. If the deal registration is not already associated with an existing opportunity, the deal is converted to a new opportunity upon final approval. Conversion to an opportunity does not take place if the...</td>
</tr>
</tbody>
</table>
Resolving Duplicate Partner Deal Registrations

On the Edit Deal Registration page, Channel account managers can check for potential duplicate accounts, contacts, and opportunities before making an approval decision for a deal registration in Pending Approval or Returned status. By reducing duplicates, channel account managers can maintain clean customer data, prevent channel conflict, and accurately reward the first partner to register the deal.

When channel account managers submit multiple deal registrations for approval from their Deal Registrations list view, a check for duplicate opportunities automatically runs to minimize conflict between partners pursuing the same deals, or between partners and the channel organization’s own sales team.

 recordings that reference existing accounts.

If duplicates are detected, the channel account manager sees a list of possible duplicate record types, followed by a table showing which one is currently used in the deal registration.

Viewing Deal Registration Approval Information and Approval History

On the Deal Registration Summary page, channel account managers can view the approval information and the approval history for a submitted deal registration, so they can see who approved or rejected the deal registration and at what stage in the approval workflow.

When a deal registration is in Rejected, Pending Approval, Approved, Returned, or Expired status, channel account managers can see the following information:

- **Submitted By:** Name of the user who submitted the deal registration.
- **Submitted Date:** Date on which the deal registration was submitted.
- **Approved/Rejected/Returned by:** Name of user who performed the Approve, Reject, or Return action.
• Approved/Rejected/Returned Date: Date on which the Approve, Reject, or Return action was performed and registration status changed.
• Rejected/Returned Reason: Reason codes selected for the Reject or Return action.
• Rejected/Returned Comments: Comments entered during the Reject or Return action.

Once a deal registration has been submitted, channel account managers can see the deal registration’s approval history, including:

• Stage: the workflow description
• Date: the date the event occurred
• Approver: the user or users who were assigned the approval task in the workflow
• Status: the status of the deal registration at this stage in workflow

Creating a Partner Deal Registration
Channel account managers can create a new deal registration for one of their partners in situations where the partner doesn’t have access to the company’s channel or partner portal to register a deal. Channel account managers ensure that the partner receives the deal registration benefits and channel account managers also provide visibility to the partner’s pipeline.

When creating a deal registration for a partner, the channel account manager can:

• View and update header information
• View and update customer information, such as: account, contact, and address information
• Select a partner for the deal registration
• Specify the partner type
• View and update product information
• Save and close the deal registration
• Save and continue editing the deal registration
• Cancel the deal registration

Editing a Partner Deal Registration
Channel account managers can review and edit deal registrations they created on behalf of a partner or deal registrations submitted for approval by their partners. Channel account managers need to validate that the deal registration meets their company’s criteria for approval before converting it to an opportunity.

Channel account managers can edit a deal registration’s details from their list view by clicking the deal registration number. On the deal registration’s Edit page, channel account managers can take the following actions:

• Approve the deal registration
• Reject the deal registration
• Return the deal registration
• Save and close the deal registration
• Cancel updates and close the deal registration

Channel account managers can edit information on the following deal registration tabs:

• Summary: view and update customer information, such as account, contact, and address information
• Team: manage the deal registration visibility for internal resources or partner resources
• Activity: view and manage activities
Partner Deal Registration Expiration

To gain better visibility of deals that partners aren’t able to close, channel account managers may want to configure the deal registration status to change to Expired when a deal has exceeded the expiration period of 90 days from approval date.

Once a deal registration has been approved, channel account managers can see and change the expiration period for a deal registration in the Expiration Date field. The preconfigured value is 90 days after the approval date. The partner receives a notification that the deal registration expires soon. The preconfigured value is 30 days.

When the expiration date passes and the opportunity associated with the deal registration has not closed, the deal registration status changes to Expired and the associated opportunity’s Registered flag changes from Yes to No. The partner receives a notification that the deal has expired. The partner cannot reopen or resubmit the expired deal registration and must create a new one.

Managing Marketing Development Funds (MDF)

Marketing Development Funds (MDF): Overview

Brand owners understand that using partners to extend their marketing efforts increases sales. When brand owners offer partners a simple way to request, use, and claim marketing development funds, the partners become more committed to implementing effective marketing activities that result in increased sales.

Market Development Funds (MDF) give brand owners the ability to make funds available to partners, so the partners can market the brand owner’s products in specific geographical areas, or so the partners can market its brand in general. MDF allows brand owners to manage the full cycle associated to marketing development funds, from creating and managing MDF budgets to managing MDF requests and claims submitted by partners.

Channel Operations Managers can create a MDF budget for a specific partner or for multiple partners located in one or multiple countries. Activated MDF budgets can be associated to MDF requests submitted by eligible partners. Partner users (or channel users on behalf of the partners) create and submit MDF requests. When the MDF request is approved, the partner can implement the marketing activity. After the marketing activity has been implemented, partner users (or channel users on behalf of the partners) submit one or more MDF claims so they can be reimbursed for their marketing expenses. When a MDF claim is approved, the approved amount is expected to be paid in one or more installments. MDF claim settlements store the information about each of these payments.

Marketing Development Fund (MDF) Objects: How They Work Together

To understand Marketing Development Funds (MDF), you must understand how each of the MDF objects fit together in the MDF lifecycle. The MDF objects are:

- MDF Budgets, allows brand owners to create and manage MDF budgets that can be used by eligible partners.
- MDF Requests, allows partner users to request funds to implement strategic marketing activities.
- MDF Claims, allows partner users to submit claims seeking reimbursement for the marketing expense incurred.
• MDF Claim Settlements, allows partner users to track their claim payment progress and allows channel users to capture claim payment information.

MDF Budgets
Channel operations managers can use the Budgets tab to view all MDF budgets they have permission to see, and to create MDF budgets that can be used by a specific partner or by a group of partners in one or more countries. Each MDF budget:

• has a start and an end date.
• has a request deadline, which is the last day partners have to submit requests against the budget.
• has a claims deadline, which is the last day to submit claims against the approved requests on the budget.
• allows channel managers to specify the type of marketing activities the budget can be used for, such as advertising, or events.

Channel managers can do the following with MDF budgets:

• Control which internal channel users have view or edit access to the budget.
• Activate and inactivate the budget.
• View and manage approved requests associated to the budget.
• View and manage approved or rejected claims associated to the budget.
• Track the funds available in the budget.
• Add notes about the budget.

Note: An active budget can be inactivated at any time by any team member of the budget team with the appropriate access.

MDF Requests
Partners can create and submit MDF requests to get approval for marketing funds. Partner sales managers can save a request in draft status, which allows them to make updates before submitting the request for approval.

When the request is submitted for approval, the partner owner is notified of the submission. The partner owner has the option to return, withdraw, reject or approve the request. If a request is returned, rejected or withdrawn, the submitter of the request is notified via e-mail and system notifications. Partner users on the request team with edit or full access can re-submit returned or withdrawn requests.

If the partner owner approves the request, e-mail and system notifications are sent to all users with the channel operations manager role for final approval. A channel operations manager can also withdraw, return, reject, or approve the request. The submitter is also notified in these instances. If the request is withdrawn or returned, partner users with the right access can re-submit the request. A MDF request must have an associated MDF budget for the approval to be successful. Anyone designated as an approver can associate a budget to the MDF request. When the channel operations manager approves the request, the request status changes to Approved and the partner can begin the marketing activity.

Note: Rejected requests cannot be re-submitted.

Channel users can do the following with MDF requests:

• View all requests they have permission to see.
• Create and submit requests on behalf of the partners.
• Add activities and notes to the request.
• Allow other partner and channel users to view or manage the request.
• View MDF claims on the request if they are on the claim team.

Partner sales managers and partner administrators can do the following with MDF requests:
• View all requests they have permission to see from their partner company.
• Create and submit requests.
• Add activities, appointments, tasks, and notes to the request.
• Allow other members of the partner company to view or edit the request.
• View MDF claims on approved requests.

MDF Claims
To be reimbursed for the marketing expenses incurred, partners can submit one or more MDF claims against an approved MDF request.

Partner sales managers or partner administrators can track the progress of their claims from submission to payment. They can view either all claims submitted by their partner company or just claims associated to a specific request. Partner administrators can see all requests and claims for the enterprise. Channel users can track the progress of their partners’ claims from submission to payment. They can see a list of all the MDF claims submitted by partners. Channel users can also access MDF claims from a specific MDF request. On behalf of a partner, a channel user can create and submit MDF claims against any approved MDF request.

When submitted, the claim goes through a two-level approval process. The partner owner is the first approver and a channel operations manager is the final approver. Approvers can return, withdraw, reject, or approve a claim. The submitter of the claim is notified via e-mail and system notifications. Partners can re-submit returned or withdrawn claims, but not rejected claims. When the channel operations manager approves the claim, its status becomes Approved and the approved amount on the claim is expected to be paid in the form of one or more MDF claim settlements.

MDF Claim Settlements
The approved amount on the MDF claim is paid in one or more installments, called MDF claim settlements. MDF claim settlements capture the information about each payment, and they are managed by channel users.

Partner users can view all claim settlements associated to an approved MDF claim on the Claim Settlements tab.

Using the MDF Audit Report for Channel Managers: Explained
Sales administrators and channel managers can use the MDF audit reports to track any changes to standard and custom attributes of both parent MDF objects and their child objects. You can track new, updated, and deleted records for the MDF objects and for the attributes of the MDF objects that are enabled for auditing.

For each of your MDF records, you can also track what attribute was changed, including both the old and the new value, when it was changed, and who changed it - even if the change was made by an impersonator.

The MDF audit features are not included with shipped job roles and these features are not automatically available. Sales Administrators must first configure functional security to determine which role or roles can configure MDF audit, and which role or roles can create audit reports. Before you can run the MDF audit report, sales administrators or channel operations managers must also select which MDF objects are turned on for audit and build the audit report. For more information on determining which roles can configure and create MDF audit reports, and steps for configuring which MDF objects can be audited, see the Partner Relationship Management chapter of the Implementing Sales guide.
What is Audited for MDF?

The following table shows which child objects are audited for each MDF object.

<table>
<thead>
<tr>
<th>MDF Object Name</th>
<th>What is Audited</th>
</tr>
</thead>
<tbody>
<tr>
<td>MDF Budget</td>
<td>MDF Budget Team</td>
</tr>
<tr>
<td>MDF Budget</td>
<td>MDF Budget Countries</td>
</tr>
<tr>
<td>MDF Request</td>
<td>MDF Request Team</td>
</tr>
<tr>
<td>MDF Claim</td>
<td>MDF Claim Team</td>
</tr>
<tr>
<td>MDF Claim</td>
<td>MDF Claim Settlement</td>
</tr>
</tbody>
</table>

Building and Running the MDF Audit Report

Audit data is available as of the day the object and attributes were enabled.

Sales administrators and channel operations managers can follow these steps to build, run, and export the MDF audit report.

1. Sign in with your Sales Administrator or Channel Operations Manager credentials.
2. From the Navigator, click the **Audit Reports** link.
3. On the Audit Reports page, set the parameters for the audit report, including:
   a. Enter the dates for the period of time you want to audit. You can select before or after a specific date, a specific date, or a date range.
   b. You can choose to track all changes made by a specific user on any object including the MDF objects for which audit is activated.
   c. You can choose to track changes made by a specific user on all MDF objects under the Marketing product.
   d. You can choose to track changes made by a specific user on a specific MDF object under the Marketing product.
   e. You can choose to track changes made by any user on all MDF objects under the Marketing product.
   f. You can choose to track changes made by any user on a specific MDF object under Marketing product.
   g. You can choose to track changes by all events or specific events, such as Object Data Insert, Object Data Update, Object Data Delete.
   h. You can choose to track changes made to the child objects of the MDF objects.
   i. You can search for changes by description. The text you type in the Description field is matched against the attribute specified for each MDF object. For example, if you type 005, then Oracle Sales Cloud searches for Budget Codes with 005, Resource IDs with 005, and so on.

<table>
<thead>
<tr>
<th>MDF Object Name</th>
<th>Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>MDF Budget</td>
<td>Budget Code</td>
</tr>
<tr>
<td>MDF Budget Team</td>
<td>Resource ID</td>
</tr>
<tr>
<td>MDF Budget Countries</td>
<td>Country Code</td>
</tr>
<tr>
<td>MDF Object Name</td>
<td>Attribute</td>
</tr>
<tr>
<td>-----------------------</td>
<td>------------------------------</td>
</tr>
<tr>
<td>MDF Request</td>
<td>Fund Request Code</td>
</tr>
<tr>
<td>MDF Request Team</td>
<td>Resource ID</td>
</tr>
<tr>
<td>MDF Claim</td>
<td>Claim Code</td>
</tr>
<tr>
<td>MDF Claim Team</td>
<td>Resource ID</td>
</tr>
<tr>
<td>MDF Claim Settlement</td>
<td>Number (This number is the Claim Settlement ID and it is displayed on the UI).</td>
</tr>
</tbody>
</table>

4. Run the search.

The default MDF audit report returns the following information:

- The date the change was made
- The user who made the change
- The event type
- The MDF object that was changed
- A description of the change.

5. To see if changes were made by an impersonating user, select the **Show Impersonator** check box.

6. To see the attribute details, select the **Show Attribute Details** check box and either select **All Attributes** or specify the individual attributes to be displayed in the following new columns:

   - Attribute
   - Old Value
   - New Value

7. To see additional MDF object attributes in addition to the field that was changed, select the **Show Extended Object Identifier Columns** check box and the information appears in the following new columns:

<table>
<thead>
<tr>
<th>Business Object Type</th>
<th>Context Name1</th>
<th>Context Name2</th>
<th>Context Name3</th>
</tr>
</thead>
<tbody>
<tr>
<td>MDF Budget</td>
<td>Name</td>
<td>Type</td>
<td>Owner</td>
</tr>
<tr>
<td>MDF Request</td>
<td>Name</td>
<td>Partner</td>
<td>Owner</td>
</tr>
<tr>
<td>MDF Claim</td>
<td>Name</td>
<td>Partner</td>
<td>Owner</td>
</tr>
<tr>
<td>MDF Claim Settlement</td>
<td>Name</td>
<td>Partner</td>
<td>Amount</td>
</tr>
<tr>
<td>MDF Budget Team</td>
<td>Name</td>
<td>Organization</td>
<td>Role</td>
</tr>
<tr>
<td>MDF Request Team</td>
<td>Name</td>
<td>Organization</td>
<td>Role</td>
</tr>
</tbody>
</table>
What determines the level of access I have to marketing budgets?

Access to a marketing budget is determined by the type of membership you have which is based on your team member role. Internal marketing users, such as Channel Account Manager, can manage the budget, and they have access to all the privileges that the owner of the budget has. Partner users, such as Partner Sales Representatives, can view the budget during a fund request.

If an internal marketing resource is added to the team and has the appropriate duty role of a Channel Account Manager, then the resource can manage a budget as well as submit a fund request against a budget from the Budget user interface. If a partner resource is added to the team with the duty role of a Channel Account Manager, then that partner resource user can only remove and add people from their Organization to the team and submit fund requests against the budget. Finally, if a partner resource is added to the team as Partner Sales Representatives role, they are only allowed view the budget information during the fund request process.

Managing Partner Contacts

Managing Partner Contacts: Overview

Channel account managers can create and manage partner contacts using the Oracle Sales Cloud simplified pages. Channel account managers can edit partner contacts, including updating:

- Name
- Address
- Contact information

Channel account managers can view and manage a list of partner contacts for the partner company. Channel account managers can enable partner contacts as resources, assign roles and managers to them, and optionally provision user accounts for them. These contacts can then sign into the Oracle Sales Cloud simplified UI portal and become members of the team for the account, lead, and opportunity.

**Note:** The partner account to which the partner contact belongs must be in Active status before you can see the Create User Account check box on the Manage Contact page.

Channel account managers can add existing account contacts to a partner as partner contacts, so they don’t create multiple records for the same contact person. To add account contacts as partner contacts, the partner must also be an account. When channel account managers delete partner contacts with user accounts, those user accounts are deactivated so the partner contacts can no longer sign into the partner portal.

To create a partner contact for a partner account, you must provision a resource role and a user account for the partner contact. Use the Manage Users task in the Setup and Maintenance work area and create a new user with the Partner Sales Representative resource role.
Creating New Partner Contacts: Procedure

Channel account managers can use the Partner pages to create new partner contacts for their partner organizations.

Creating a New Partner Contact

Use these steps to create a new partner contact for a partner.

1. Sign in with your channel account manager credentials.
2. Click Partners, and from your list of partners, search for and select the partner to edit it.
3. Click the partner’s Contacts tab.
4. Click Create Partner Contact and enter the details.
5. Click Save and Close.
6. Select the partner contact and click Create User Account to manage additional user information, such as provisioning:
   - Resource
   - Role
   - User account
7. The User account provisioning will give the partner contact access to the partner portal.

Adding Existing Account Contacts as Partner Contacts: Procedure

Channel account managers can add existing account contacts as partner contacts.

⚠️ Note: Account contacts can be added as partner contacts only if the partner is also an account that you sell to. The Add Contacts button will not appear unless this is the case.

Adding an Existing Contact as a Partner Contact

Use these steps to add an existing account contact as a partner contact for a partner.

1. Sign in with your channel account manager credentials.
2. Click Partners, and from your list of partners, search for and select the partner.
3. Click the partner’s Contacts tab.
4. Click Add Contacts.
5. On the Add Contacts page, search for and select the contact you want to add as a partner contact.
6. Click OK, and click Save and Close.

Editing Partner Contacts: Procedure

Channel account managers can use the Partner pages to edit partner contact information. Channel account managers can edit the partner contact’s name, e-mail address, job title, phone number, and address.
Editing a Partner Contact

Use these steps to edit information about a partner contact.

1. Sign in with your channel account manager credentials.
2. Click Partners and from your list of partners, select the partner.
3. Navigate to the partner’s list of Partner Contacts and select the partner contact you want to edit.
4. On the Edit Partner Contact page, you can edit the partner contact’s name, e-mail address, job title, phone number, and address.
5. Click Save and Close.

Editing Partner Contact User Information: Procedure

Channel account managers can use the Partner pages to edit user information about a partner contact, including the partner contact’s role and manager. Channel account managers can also grant the partner contact access to the partner’s Partner Portal.

Note: The partner account to which the partner contact belongs must be in Active status before you can see the Create User Account check box on the Manage Contact page.

Editing User Information About a Partner Contact

Use these steps to edit user information about a partner contact.

1. Sign in with your channel manager credentials.
2. Click Partners and from your list of partners, select the partner.
3. Click the Contacts tab, and search for and select the partner contact you want to edit.
4. Click the contact’s Profile tab.
5. Click the Manage User Details link.
6. On the Manage User Details page, you can edit the partner contact’s role and manager.
   - If you want to create a user account for the partner contact, click the Create User Account check box.
   - If the partner contact is already a user and you want to deactivate the user account, click the Deactivate User Account link.
7. Click OK, and click Save and Close.

Managing Partner Programs

Defining a Partner Program: Overview

The process for defining a partner program involves the following steps:

1. Create or Update a Partner Program.

   Channel managers define the case for the program, indicate the benefits, and costs to maintain the program over its term. They also determine the scope of availability of the program by using countries. Channel managers can also establish goals or targets for the program, like: enrollments, units sold through, market coverage growth. Channel
managers work with a number of internal functions like channels marketing, strategy, operations, and business practices to define the characteristics and proposed roll out schedule of a program.

*Note:* The process of defining a program can span over weeks or months.

2. Define or update program summary.

Channel managers define the program summary information and set the program to Draft status. The program can be partially saved at any point in the process. Channel managers design the offering that will appear on the portal in order to position and sell the program to prospective partners.

3. Define or update program benefits.

Channel managers can also define the proposed benefits for the program.

4. Publish the program (submit it for approval).

5. Review Program for Approval.

Workflow approvals are then submitted to the manager to review the program as defined, and approve the program for release or publication. Approvers do the following:

a. Receive a notification of pending workflow item.

b. Open the item and review the summary, benefits, and tiers.

c. Approve or reject, programs using custom approval workflows.

Channel managers can release the program when it is Approved.

**Partner Program Actions and Status: Explained**

A partner program can have different statuses during its lifecycle. The program’s status determines the actions you can take on the program.

Partner program actions include the following:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>Select this action to create a new partner program.</td>
</tr>
<tr>
<td>Delete</td>
<td>Select this action to remove a partner program. You can only delete programs that are in Draft status.</td>
</tr>
<tr>
<td>Terminate</td>
<td>Select this action to end the partner program but not delete it.</td>
</tr>
<tr>
<td>Withdraw</td>
<td>Select this action to withdraw a submitted partner program.</td>
</tr>
<tr>
<td>Publish</td>
<td>Select this action to publish a program. A partner program in Published status is active and partners can enroll into it.</td>
</tr>
</tbody>
</table>

Program statuses include the following:
<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>This is the initial status for newly created programs. This is also the state to which programs return when they are unpublished (or withdrawn from a custom approval workflow - if configured). The channel organization can delete programs in Draft status.</td>
</tr>
<tr>
<td>Pending</td>
<td>This status indicates that the partner program is undergoing approval processing. When programs are in this state, you cannot edit them except for custom fields specifically configured for editing in this state.</td>
</tr>
<tr>
<td>Failed</td>
<td>The partner program enters this state if the approval process fails. You can edit programs in this state.</td>
</tr>
<tr>
<td>Rejected</td>
<td>If you are using custom approval rules to route programs to another user for approval and that approver rejects the program, the program enters this state. You can edit programs in this state.</td>
</tr>
<tr>
<td>Published</td>
<td>This status indicates that the partner program is active and is open for enrollment to partners. When programs are in this state, you cannot edit them except for custom fields specifically configured for editing in this state.</td>
</tr>
<tr>
<td>Terminated</td>
<td>This state means the program has been terminated, either manually through a user action, or automatically upon the program’s end date. When programs are in this state, you cannot edit them except for custom fields specifically configured for editing in this state.</td>
</tr>
</tbody>
</table>

**Note:** The channel organization can review partner programs that are in Draft, Failed, or Terminated status.

**Partner Program Approval: Explained**

By default, partner programs are auto-approved after the user selects the Publish action. When the program is approved, it is immediately published and ready for partner enrollments. However, if you are using custom workflows for approval, the following occurs:

The approver receives a notification and opens and reviews the partner program. The approver can then approve or reject the program. When the partner program is approved, it is automatically released for enrollment and the program status changes to Published.

**Note:** The approval process may take days, weeks, or months to reach the point where programs are ready for approval and release.

**Eligibility for Partner Programs: Explained**

Channel managers can define the eligibility criteria for a partner program, so the manager can identify partners to invite to this program.
Eligibility Criteria

Programs can be targeted to partners based on:

- Geography served
- Number of customers served
- Industry and product focus
- Membership in other programs
- Metrics associated with the partner, such as the number of training classes taken, expertise in a product, size of the partner organization and so on.

Tip: The program questionnaire also helps gather information from potential partners to determine their eligibility for a program.

Partner Program Benefits: Examples

Channel managers define the benefits for a partner program, such as:

- Additional incentives for deal registration
- Access to product sales and marketing collateral
- Free training
- Platinum support.

Scenario

A channel manager creates a partner program with benefits like free training and platinum support.

Managing Partner Programs for Channel Managers: Overview

Partner programs represent relationships between you, the brand owner or channel company, and different types of qualified partners, such as resellers, systems integrators, and distributors. You can make partner programs global or specific to a country, and you can choose to utilize a tiered structure in your programs if you want. Partner programs provide benefits to approved partner enrollees.

Channel managers working for the brand owner must first create a program and tier structure to define a partner’s position in the program. You can base the partner’s position on the partner’s investment in the relationship, which you can determine from different criteria such as revenue, competencies, and customer satisfaction.

The partner program structure should also provide consistency across the globe, and align partners with the correct programs. Finally, appropriate benefits - whether financial, sales, marketing, technical, training, or other types of resources - should be offered to partners according to their level of investment, as reflected in the partners’ tiers, to ensure the brand owner’s investment in the partners is worth the cost.

You can use Oracle Sales Cloud Partner Relationship Management functionality to define a global program structure, with or without tiers, streamline the program approval process, and group partners into that structure. You can also define and assign benefits to partners based on their position in your partner programs. Channel managers gain increased visibility into
the partner benefits and program elements. They can easily promote or demote partners, as needed. You can quickly and easily adjust your partner programs as your business changes and grows.

Channel managers can use the Programs pages to:

- set up a program structure to distinguish and reward your partners, based on their performance and contributions to your business.
- define partner programs with or without tiers, and add benefits from a benefits library to programs or program tiers.
- assign tiers to partner accounts, and enforce country-based and tier-based eligibility when enrolling partners in different programs.

Creating Partner Programs

Use these steps to create a partner program.

1. Sign in with your channel manager credentials and from your Partner Management area, click Programs.
2. Click Create Program.
3. In the Name field, provide a name for the program you are creating.
4. From the Type list, select the type of program you are creating, such as Technology Partner, Reseller, or Distributor. This is the type of partner you are targeting with the program.
5. From the Owner list, select the owner of the program you are creating.
6. If you want to designate the program for a specific country, you can select the country from the Country list. Selecting All will allow the program to be global.
7. If you want the program to begin or end on a specific date, you can use the Start Date and End Date fields to indicate the date.
8. If you don’t want to publish your partner program, click Save and Close. Otherwise, click Save and Continue.
9. If you clicked Save and Continue, you can now publish the program by selecting the Publish action.

Creating Tiers

Use these steps to create tiers.

1. Sign in with your channel manager credentials and from your Partner Management area, click Programs.
2. Click the Tiers tab.
3. On the Tiers page, click Add.
4. Provide a name for the tier.
5. Select a badge for the tier. The badge is an icon used to quickly identify the tier.
6. Click Save to save your work.
7. Click Add to create additional tiers. If you have multiple tiers, you can use the ordering arrows, to move tiers up or down.
8. Click Save to save your work.

Adding Tiers to a Partner Program

Use these steps to add tiers to a partner program.

- **Note:** Tiers must already exist before you can add them to partner programs.

1. Sign in with your channel manager credentials and from your Partner Management area, click Programs.
2. From your list of programs, select the program you want to add tiers to.
3. On the program Summary page under the Tiers section, click Add and select the tier you want to add to the program.
4. Click Save and Close to save your work.
Deleting Tiers
Use these steps to delete tiers.

♫ Note: You can only delete a tier after it’s been removed from all partners and programs that are using it.

1. Sign in with your channel manager credentials and from your Partner Management area, click Programs.
2. Click the Tiers tab.
3. On the Tiers page, click the X corresponding to the tier you want to delete.
4. Click Save to save your work.

Creating Benefits
Use these steps to create benefits.

1. Sign in with your channel manager credentials and from your Partner Management area, click Programs.
2. Click the Benefits tab.
3. On the Benefits page, click Create Benefit.
4. Provide a name for the benefit.
5. From the Value Type list, select the type of value the benefit provides, such as Amount, Number, or Percent.
6. From the Category list, select the category that your benefit fits into.
7. In the Description field, you can type a short description of the benefit.
8. Click Save and Close.
9. Click Save to save your work.
10. Click Add to create additional tiers. If you have multiple tiers, you can use the ordering arrows, to move tiers up or down.
11. Click Save to save your work.

Adding Benefits to a Partner Program
Use these steps to add benefits to a partner program.

♫ Note: Benefits must already exist before you can add them to partner programs.

1. Sign in with your channel manager credentials and from your Partner Management area, click Programs.
2. From your list of programs, select the program you want to add benefits to.
3. Click the Benefits tab.
4. On the program Summary page under the Benefits section, click Add and select the benefit you want to add to the program.
5. You can use the Tier list to make the benefit specific to a certain tier of the partner program.
6. Click Save and Close to save your work.

Deleting Benefits
Use these steps to delete benefits.

♫ Note: You can only delete a benefit after it’s been removed from all partners and programs that are using it.

1. Sign in with your channel manager credentials and from your Partner Management area, click Programs.
2. Click the Benefits tab.
3. From your list of benefits, select the benefit you want to delete.
4. On the Edit benefit page, click Delete Benefit.
Managing Partner Program Enrollments

Managing Partner Program Enrollments: Overview

A partner program enrollment (called Enrollment) is the enrollment of a partner in a specific partner program. Active enrollment in partner programs can make partners eligible for benefits and incentives that come with the partner program.

A partner program, also called a channel partner program, is a business strategy that brand owners use to encourage partners to sell the brand owner’s products or associated services. Channel partner programs can also feature specific incentive opportunities for sales of a specific product or service to help boost the brand owner’s market reach with that product. These incentives can be additional margins on sales of a specific product, increasing based on volume of sales. Other incentives can include awards and industry recognition at brand owner events, extra marketing resources, or rewards to channel partner sales staff.

Channel account managers can manage partner program enrollments for their partners by approving partner enrollment requests, enrolling partners in programs, editing enrollment summary information, and renewing partner enrollments. The most common tasks channel account managers perform with enrollments are grouped together on the Actions menu.

Creating, Submitting, and Approving Enrollment Requests: Explained

Channel account managers can use a simplified list of partner program enrollments, across all of their partners or by individual partner, to easily manage the enrollments for their partner accounts. Channel account managers can quickly create new enrollments, submit them for approval, and approve them.

Creating, Submitting, and Approving an Enrollment Request for a Partner Account

Use these steps to create a new program enrollment request for a partner account.

1. Sign in with your channel account manager credentials.
2. Click Enrollment, and click Create Enrollment.
3. On the Create Enrollment page, provide the necessary information about the program enrollment.
4. Click Save and Continue.
5. On the Edit Enrollment Summary page, verify the enrollment request information and click Submit.
6. Click Save and Close.
7. On your springboard, click Notifications.
8. From your list of recently created enrollment requests, search for and select the new enrollment request.
9. Select the new enrollment request, and click Claim in the dialog box.
10. From the Actions menu, select Approve.

You should now be able to see your new enrollment in your main list of enrollments.
FAQs for Managing Partner Program Enrollments

What enrollments does selecting My Partners' Enrollments display?
When you select the My Partners' Enrollments list in the Partners work area, the application displays a list of enrollments for partners where you are on the partner team. You are automatically on the partner team if you created the partner or you can be assigned to the partner team either by another team member or an automatic process.

What enrollment records do the different record sets permit you to search?
The different record sets provided in the Saved Searches window restrict your saved searches to different sets of information. The following table lists and describes the record sets for enrollments. Not all record sets are available to all users.

<table>
<thead>
<tr>
<th>Record Set Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am on the team</td>
<td>Accounts where you are on the team. You are on the team if you are the account owner or were added as a member by another team member.</td>
</tr>
<tr>
<td>All records I can see</td>
<td>Program enrollments you can view based on your partner team membership, internal territory assignments, my position in the organization, and security permissions.</td>
</tr>
<tr>
<td>I am the program owner or manager</td>
<td>Accounts that you can view based on your account team membership, sales territory assignments, your position in the organization, and security permissions.</td>
</tr>
</tbody>
</table>

Tip: To improve saved search performance, restrict your saved searches to smaller record sets. For example, rather than searching all the records you can see, search all the records where you are on the team. Or restrict your searches to a smaller geographical area. For example, search all the partner enrollments in one state instead of the whole country.

Managing Partner Leads

Managing Partner Leads: Overview
Channel account managers can use simplified Oracle Sales Cloud Leads pages to assign leads to the partners who are best qualified for the leads, track the progress of the lead, and convert the lead into an opportunity. The leads available to channel account managers may come from territory-based assignment, rule-based assignment, or a combination of both.

When a channel account manager assigns leads, the primary partner contact for each partner receives notification of the lead assignment, so that the partner contact can accept or reject the leads.

Channel account managers can assign partners to a lead by:
- Changing the lead owner to a specific partner user or contact in the Edit Lead page.
- Changing the partner to a specific partner account. In this instance, the partner’s primary contact is automatically assigned to the lead (added to the team).
Assigning and Reassigning Leads to Partners: Procedure

Channel account managers can use simplified Leads pages to assign and reassign leads to the partners who are best suited to successfully handle the lead and drive it forward towards becoming an opportunity.

Assigning Leads to Partners

If you are a channel account manager, you can follow these steps to assign leads to your partners:

1. Sign in with your channel account manager credentials and click Leads.
2. On the Leads list page, you can filter your list by selecting Unassigned Partner Leads in the List field.
3. Select the lead you want to assign, and use the Change Partner action to search for and select the appropriate partner for the lead.
4. Click OK, and click Yes to confirm.

Reassigning Leads

If you are a channel account manager, you can follow these steps to change lead assignment from one partner to another:

1. Sign in with your channel account manager credentials and click Leads.
2. On the Leads list page, search for and select the lead you want to reassign.
3. From the Actions list, select Change Partner.
4. On the Select Partner page, search for and select the partner you want to have to lead.
5. Click OK, and click Yes to confirm the partner change.

Reviewing Leads Created by Partners: Explained

Channel account managers can view leads created by their partner users in a simplified list. They can view leads created by or assigned to the partners in their territory. They can review a partner created lead by opening the lead, reviewing the lead information, and choosing an action to take from the Actions menu.

Reviewing a Partner Created Lead

Use these steps to review a lead created by one of your partner users.

1. Sign in with your channel account manager credentials.
2. Click Leads.
3. From your list of leads, search for and select the partner lead you want to review.
4. From the Actions menu, select Edit.
5. On the Edit Leads page, you can review the detailed information about the lead.
6. If you changed any of the information, click Save and Close. Otherwise, click Close.
7. From the Actions menu, click an action depending on what you want to do with the partner lead. Channel account managers can perform the following actions:
   - Accept or Reject the leads.
   - Change lead ownership.
   - Offer the lead to multiple partners based on the assignment configuration.
   - Reassign the lead to a different partner user.

Converting Partner Leads to Opportunities: Explained

Channel account managers can convert partner leads to opportunities for their partner users by selecting the lead, and clicking Convert from the Actions menu.

Converting a Partner Lead to an Opportunity

Use these steps to convert a partner lead into an opportunity for your partner users.
1. Sign in with your channel account manager credentials.
2. Click Leads.
3. From your list of Leads, search for and select the lead you want to convert.
4. From the Actions menu, select Convert.
5. On the Convert Lead to Opportunity page, ensure the lead shows the correct opportunity name, owner name, user name and account name.
6. Click Submit.

Managing Partner Opportunities

Managing Partner Opportunities: Overview

Partner-related opportunities use channel organizations to enable alliances, achieve growth and expansion strategies faster, and maximize sales through broader territory coverage. By offering the right opportunities to the right partner accounts, channel organizations can avoid channel conflict and increase revenue in their indirect sales channel.

Partner opportunities have the following benefits:

- Partner opportunities allow the channel sales force and partner accounts to work collaboratively and share information effectively as a team.
- Partner opportunities provide a means of measuring the progress of a partner account, and thus compensate fairly based on the partner account involvement.
- Partner opportunities help revenue from partner opportunities to be more accurately forecasted by brand owners.
How Partner Accounts Are Added to Opportunities

Partner accounts typically become involved in opportunities in one of the following ways.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>A channel account manager adds the partner account to an internal opportunity.</td>
<td>The channel account manager can locate unassigned opportunities, review the details of the opportunities, select the most appropriate partner account for each opportunity, and designate a primary partner for the opportunity. The channel team can then monitor the opportunity progress.</td>
</tr>
<tr>
<td>A partner lead is converted to an opportunity by the partner or brand owner.</td>
<td>Partner salespeople can convert leads to opportunities. After they’re accepted, leads assigned to partners can be converted to an opportunity based on the lead qualification outcome, such as Interest, Budget, and Purchasing Time Frame.</td>
</tr>
<tr>
<td>A partner account creates an opportunity in the partner portal.</td>
<td>The partner account is the opportunity owner. The channel account manager is also added to the opportunity and becomes the credit receiver for the revenue rollup and forecasting.</td>
</tr>
</tbody>
</table>

**Note:** Oracle Sales Cloud is preconfigured to assign partners to opportunities using territory-based assignment. For more information, see the help. Use the keywords "partner assignment".

**Related Topics**
- Manually Assigning Partners and Partner Sales Credits in Opportunities: Explained
- Partner Lead Attributes in Opportunities: Explained
- Searching for Duplicate Opportunities: Explained

Partner Visibility into Opportunities: Explained

By default, the channel account manager who owns the partner account automatically has visibility into all opportunities that his partner creates. On these opportunities, the channel account manager can see all the partners associated with the opportunity using the partner subtab. He can also view the primary partner on the opportunity summary page.

Partner users can view all opportunities they created as they become the owners of these opportunities. They can also see opportunities where they are part of the sales team. When creating opportunities, partner users can only use the accounts and contacts that have been shared by the brand owner or that they own. For the accounts and contacts that are shared, the administrators can configure the access to be view-only.

While partner users can select accounts and contacts they have access to, administrators can enable validation to prevent partner users from changing certain attributes.

Additionally, partner users can only view resources from their own company on the opportunity team. Any additional internal resources or resources that belong to other partners on the team are hidden. Similarly, the resource selector on the team tab is also limited to show only the resources that belong to their partner company.

Managing Service Requests
Managing Partner Service Requests for Channel Managers: Explained

If the Service offering has been enabled for your implementation, Oracle Sales Cloud provides service request tools to help channel managers efficiently resolve any issues that their partners are experiencing. These tools include a Service Request subtab and a Service Request infolet. The Service Request subtab is available on Partner pages, and can be configured to appear on other pages, such as Deal Registration and Opportunity pages. Channel managers can view the Service Request infolet on the Partner Overview page.

Where Do Channel Managers Find These Service Request Tools?

If the Service offering has been enabled, channel managers and their partner users can see the Service Request homepage icon and manage service requests directly from these pages. Channel managers can also see the Service Request subtab on the Partner Overview page, and on the Deal Registration and Opportunity pages if these pages have been configured for Service Requests. Both channel managers and their partners can see the Service Request infolet on the Partner Overview page.

How Do Channel Managers Use The Service Request Subtab?

Channel managers can use the Service Request subtab to view a list of service requests tied to their accounts and to their partners, so they can efficiently meet the service requirement needs of their partners and their partner’s customers. Channel managers can also log and manage service requests on behalf of both their partners and their partner’s customers.

What Information Does The Service Request Infolet Show?

The Service Request infolet on the Partner Overview page shows a count of open service requests associated with the current partner. This count includes service requests for the following instances:

- Service requests that the partner logged for their own needs, such as requests for partner portal or deal registration support.
- Service requests the partner logged on behalf of their end customers as part of customer support.
- Service requests that the partner logged regarding a deal registration or opportunity on which the partner is working.
- Service requests that a channel manager created on behalf of their partner or their partner’s end customers.

Creating a Service Request

When channel managers create a service request on behalf of their partners, the partner in context automatically becomes the partner on the service request and channel manager can select the primary contact for the service request from a list of contacts for the partner company.

Channel managers can use these steps to create a service request for their partner.

1. Sign in with your channel manager credentials.
2. From the Partner Management work area on your home page, click Partners.
3. From the list of partners on the Partners page, search for and select the partner you want to create a service request for.
4. On the Edit Partner page, click the Service Request subtab.
5. On the Service Request page, click Create Service Request.
6. In the Title field on the Create Service Request page, type a name for the service request.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>User Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Type a descriptive title for your service request.</td>
</tr>
<tr>
<td>Field Name</td>
<td>User Action</td>
</tr>
<tr>
<td>------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Account</td>
<td>Provide the name of the customer you are creating a service request for.</td>
</tr>
<tr>
<td>Partner Account</td>
<td>Sales administrators can add a Partner Account field through extensibility. This field shows the name of your partner company.</td>
</tr>
<tr>
<td>Primary Contact</td>
<td>The default value is the primary contact for the partner company, however you can select another contact from the partner company.</td>
</tr>
<tr>
<td>Severity</td>
<td>Select a severity for the service request, such as Low, Medium, or High. The default value is Low.</td>
</tr>
<tr>
<td>Critical</td>
<td>Click this check box if the service request you are creating is urgent.</td>
</tr>
<tr>
<td>Category</td>
<td>Select the appropriate category for the service request.</td>
</tr>
<tr>
<td>Product</td>
<td>If the service request pertains to a particular product, you can select it from this list.</td>
</tr>
<tr>
<td>Description</td>
<td>Type a description for the service request.</td>
</tr>
</tbody>
</table>

7. Click **Save and Close**.

**Using the Partner Portal**

**Managing Leads in the Partner Portal: Explained**

Partner sales representatives can access the Oracle Sales Cloud partner portal to view and manage leads assigned to them, and to create and manage new leads for the brand owner.

**Accepting or Rejecting Existing Leads**

As a partner sales representative, you can follow these steps to accept or reject leads assigned to you by the channel sales team:

1. Sign in to the partner portal and click Leads.
2. From your list of open leads, select the lead or leads you want to accept or reject.
3. From the Actions list, choose the action you want to take on the leads you selected.
4. Click OK.

**Note:** If you choose to reject leads, when you click OK, you can provide a reason and details about why you rejected them. You provide this information so the channel account manager can more accurately assign you subsequent leads.
Creating New Leads

As a partner sales representative, you can follow these steps to create new leads with your channel organization:

1. Sign in to the partner portal and click Leads.
2. From your Leads list page, click Create Lead.
3. On the Create Lead page, provide the necessary lead details.
4. Click OK.

Converting Leads to Deal Registrations in the Partner Portal: Explained

Partner users who own the lead or are on the lead team can use the Deal Registrations subtab on the Leads pages to convert a lead into a deal registration. When a partner registers the lead as a new deal, the lead details such as the Account, Contact, Owner, and Deal Size information copy over to the deal registration.

The mapping of the Lead to Deal Registration fields can be customized, however the following information appears on the deal registration by default:

- If the lead doesn’t have an owner, the partner user who registers the deal becomes the owner. All of the partner members on the lead team are copied to the Deal registration team with the same access they had on the Lead team, with the exception of the Owner, who has Full access.
- If the lead already has a partner, then that partner is also added to the deal.
- If the lead does not have a partner, then the partner company that the partner user who registers the new deal works for becomes the partner for the deal.
- The Channel Manager field on the deal registration shows the internal resource who owns the partner account.
- If a partner program is involved in the lead, the program is copied over from the Lead Partner Program field.
- If the lead contains product information, that information is copied over to the deal.
- The deal registration status is set to Draft.
- The name of the associated lead appears in the Lead field on the Edit Deal Registration page. The partner can click the lead name to open the Lead Summary page.

📝 Note: Partner users can remove the lead to deal association by clicking the Remove icon next to each deal listed on the Deal Registrations subtab. When a partner clicks Remove, only the association between the lead and the deal is removed. Clicking Remove does not remove the deal itself.

Converting a Lead to a Deal Registration

Partner users can follow these steps to convert a lead to a deal registration.

1. Sign in with your partner sales representative, partner sales manager, or partner administrator credentials.
2. From your springboard, click Sales then click Leads.
3. From your list of leads, search for and select the lead you want to convert to a deal registration.
4. On the Edit Lead page, click the Deal Registrations subtab.
5. Click Register New Deal.
Managing Opportunities in the Partner Portal: Explained

Partner salespeople can use the Oracle Sales Cloud partner portal to view and manage opportunities assigned to them and to create and manage new opportunities for the brand owner. The brand owner can control the visibility of the Opportunities icon for partners. This control is useful when the supplier company requires that partners go through a registration process.

In the My Open Opportunities list, partner salespeople can review the opportunities they created and the opportunities where their channel account manager listed them as the opportunity owner. In the Open opportunities where I am on the team list, partner salespeople can review opportunities where their channel account manager has added them as a member of the opportunity team.

Creating New Opportunities

If you are a partner salesperson, you can follow these steps to create new opportunities with your channel organization:

1. Sign in to the partner portal and click Opportunities.
2. From your Opportunities list page, click Create Opportunity.
3. On the Create Opportunity page, provide all of the necessary account, contact, and product details for the opportunity.
4. Click OK.

Managing Activities in the Partner Portal: Explained

Partner salespeople can use the partner portal to track appointments, create tasks, or add notes for their accounts, contacts, or transactions, such as leads or opportunities, that they own or have access to.

Activities created by partner users in the partner portal are visible to the brand owner based on the user access level on the transactional objects. Similarly, Partners can view the activities created by the brand owner if they have been added to the activity team. These activities include:

- Appointments
- Tasks
- Logging calls

Scheduling an Appointment

As a partner sales representative, you can use these steps to schedule an appointment with one of your accounts:

1. Sign in to the partner portal with your partner user credentials.
2. Click Accounts. Search for and select the account you want to schedule a meeting with.
3. Click the Activities tab and click Create Appointment.
4. Provide the appointment details.
5. Click Save and Close.

Scheduling a Task

As a partner sales representative, you can use these steps to schedule a task for one of your accounts:

1. Sign in to the partner portal with your partner user credentials.
2. Click Accounts. Search for and select the account you want to schedule a task for.
3. Click the Activities tab and click Create Task.
4. Provide the task details.
5. Click Save and Close.

Adding a Note

As a partner sales representative, you can use these steps to add a note to one of your accounts.

1. Sign in to the partner portal with your partner user credentials.
2. Click Accounts. Search for and select the account you want to add a note to.
3. Click the Notes tab and click Create Note.
4. Type your note.
5. Click Save and Close.

Managing Service Requests in the Partner Portal: Explained

Partner users can view and manage their service requests on Service Request pages in the partner portal.

Note: The Service offering must be enabled for partners to see the Service Request icon on the partner portal. Customers must have an Engagement Cloud license before sales administrators can enable the Service offering for them.

How Do Partners Use The Service Request Pages?

The Service Request pages allow partners to request technical or sales support from the brand owner without needing to sign into a separate service application. Partners can use the Service Request pages to view a list of service requests, submit tickets to the brand owner and get resolution to questions, typically for sales support. Partners can also act as distributors or third-party business process providers who use service requests to raise an issue with the brand owner on behalf of an end customer.

Note: Channel account managers can also log and manage service requests on behalf of partners and the partner’s end customers.

Creating a Service Request

When partners create a service request, their partner company automatically becomes the partner on the service request, and the partner user becomes the contact for the service request.

Partners can use these steps to create a service request.

1. Sign into the partner portal with your partner credentials.
2. On your home page, click Service Requests icon.
3. On the Service Request page, click Create Service Request.
4. In the Title field on the Create Service Request page, type a name for the service request.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>User Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Title</td>
<td>Type a descriptive title for your service request.</td>
</tr>
<tr>
<td>Account</td>
<td>Provide the name of your customer account.</td>
</tr>
<tr>
<td>Partner Account</td>
<td>Sales administrators can add a Partner Account field through extensibility. This field shows the name of your partner company.</td>
</tr>
</tbody>
</table>
### Managing Partner Collaboration

#### Using Oracle Social Network to Collaborate with Your Partners: Explained

Channel organizations and partners can use the social network to collaborate. Channel organizations can invite their partners to Conversations in Oracle Sales Cloud.

Partners can use the social network to collaborate with users inside the channel organization. They can:

- Have an ongoing Conversation about, for example, how to best sell a brand owner’s product.
- Share presentations and review documents to get input from other members of the sales team.
- Receive real-time notifications about updates to key Conversations.
- Determine how they want to follow-up on items based on priority indicators.
- Start or join online conferences with other members of the sales team.

Partners can only engage in Conversations they have been added to by employees of the channel organization. Partners can’t see things like employee wall posts or public Conversations.

Channel salespeople on the social network are aware when a partner is in the Conversation because there are distinct banners, warnings, and badges highlighting the partner user.

#### Inviting Partners to Join Conversations

If Oracle Social Network has been enabled for the appropriate partner users, sales managers or channel account managers can invite the partner users into the social network. Use the following steps to invite partners to a Conversation. Channel account managers can invite partners to both new Conversations and existing Conversations.

1. Channel account managers or sales managers create a new Conversation in Oracle Social Network.
2. In the Search for and Add New Members field, type in the email address for the partner you want to invite and click Invite.

*Note:* If this is the first time a partner has been invited to into the Oracle Social Network, the channel manager must use the partner’s email address to search for and select the partner to invite. Once partners are registered within the Oracle Social Network, channel managers can search for them by name or email address. The channel manager can now see a username and avatar for the registered partner.

3. At the prompt indication an invitation will be sent to the indicated partner, click OK to send the invite.
4. Click on OK in the Create New Conversation dialog.
5. The indicated partner receives an invitation to join the Conversation.
6. The invited partner can click the links in this email invitation and join the Conversation to post messages and participate in the discussions.

If the partner views the Social Network UI from the partner pages, the partner can access the Conversation from there.
11 Using Computer Telephony Integration

Computer Telephony Integration: Overview

Oracle Sales Cloud Computer Telephony Integration (CTI) is a feature of the customer contact process. It includes a communication toolbar within the user interface and a real-time dashboard. You can initiate phone communication with customers and employees by a click of your mouse - leveraging your customer contact information and the application context. CTI integrates with your telephony environment and must be manually enabled in your deployment.

CTI includes the following features:

- Basic call control
- Automatic and manual caller identification
- Automatic logging of interactions and wrap up handling
- Linking interactions to related business objects
- One-click access to interaction notes, scheduling of tasks, and appointments
- Outbound call integration of CTI linked phone numbers in Sales Cloud objects
- Inbound call handling
- Automatic navigation to caller record
- Direct extension and ACD work group routing
- Inbound chat handling
- Transfer capabilities for calls and chat
- On Premise and Sales Cloud support
- Connects with third party CTI provider solutions with the creation of a connector API javascript.

Managing Multiple Interactions: Explained

With Oracle Sales Cloud CTI integration, you can maintain and switch between up to four interactions at a time. These interactions can include any combination of online chats and phone calls.

Handling Multiple Chat Sessions

You can easily switch between multiple chat sessions. Your toolbar displays each chat session (up to 4), with a notification. Icons on each chat session provide an easy way to determine status:

- A small yellow star on a chat icon in the toolbar indicates that it is a new chat. Click the icon to accept the chat and open its chat client window.
- A red circle on the chat icon of a session that isn’t currently active indicates that the contact has added a new chat message.
- In the currently active chat session, you can click the icons to pause the session, end it, or transfer it to another agent.
• If you have more than one chat active and you end one, the first chat to its left (if there is one) becomes the new active chat.

If at least one chat is available, there will always be an active chat.

Handling Multiple Phone Calls
The number of phone calls is dependent upon your underlying CTI connector, limited to a maximum of four total interactions for both voice and chat.

If there is an active phone call, you cannot initiate any new outbound phone calls. You can switch between active phone calls, but switching does not control which line is active. You must use your Hold and Retrieve buttons to place callers on hold and switch between active lines.

Handling Mixed Interactions
Your maximum of four interactions can include both phone calls and chat sessions. Icons for each interaction type appear in your toolbar.

To switch between interactions, click the icon for the one you want to make active. If the interaction is a chat session, its client window is displayed and it becomes the active chat session. If the interaction is a phone call, you must still use your phone’s Retrieve button to make the call active; switching between phone calls does not affect their active status.

Managing Chats: Explained
With Oracle Sales Cloud CTI integration, you can have up to four interactions (chats or phone calls) at the same time, switching between them to define the active interaction.

This topic describes the following:
• Accepting an inbound chat
• Rejecting an inbound chat
• Transferring a chat

Accepting an Inbound Chat
When you receive an incoming chat, a visual indicator appears on the toolbar. Depending on your computer-telephony interface and how your system is set up, you might also hear an audio tone. During the course of the chat, a red circle appears on the chat icon to indicate that a new chat message has been received and it is active.

To accept an incoming chat:

1. Click the Accept button on the toolbar.
   The toolbar chat region changes from the alert color to the active color, and chat action buttons replace the Accept and Reject buttons. The chat client window opens, displaying the contact’s information in the contact section of the chat frame. If you’ve checked the Navigation button on the toolbar, the screen pop is performed on the main application window.

2. Click the Snapshot icon in the toolbar chat interaction region to display the chat data in a dialog box under the chat interaction region. You can dismiss this dialog box by clicking anywhere.

3. Enter a message to the customer in the chat client window, then press Enter to submit the message.
You can end the chat by clicking the **End** button on the toolbar or on the chat client. Before finishing the interaction, you can verify that the interaction was recorded correctly by checking the following:

- The type is Chat
- The direction is Inbound
- The start and end times are valid
- The Contact and Customer are recorded correctly

### Rejecting an Inbound Chat

If you receive an inbound chat that you do not want to accept, click the **Reject** button on the toolbar.

The toolbar chat interaction region will disappear. Depending on your system, the status might go back to Available automatically, or you might have to reset it to Available.

### Transferring a Chat

In some cases (for example, if you have too many other active chats or if another agent has more expertise about a particular customer issue), you might want to transfer a chat to another agent.

To do this:

1. Make sure the chat you want to transfer is the active chat, and that the agent you want to transfer it to is available for incoming chats.
2. Click **Transfer** on the toolbar chat interaction region to open the transfer window.
3. Select the agent you want to transfer the chat to from the available list.
4. Enter a transfer note to explain to the agent why you are transferring the chat.
5. Click **Transfer** to transfer the chat.
6. After you transfer the chat, the interaction ends. If your ACD/chat server is configured to do so, you are placed in wrap-up mode, which displays the Interaction dialog where you can click **Save and End Wrap Up**. If your server is not configured in this way, the interaction ends at this point.

At this point, your status returns to Available, a new chat interaction pops up on the transferee’s toolbar, and the transfer note you entered will be displayed in a separate window on the transferee’s screen. They can dismiss the note by clicking **OK**.

If you have a new chat interaction available, you can now accept it.

### FAQs for Computer Telephony Integration

**What happens if I get another call when connected to another customer?**

Nothing happens. Oracle Sales Cloud CTI supports a single phone line.
What happens if I get an incoming call and I don't want my display to change?

Select the No radio button for Contextual Navigation on the Oracle Sales Cloud Computer Telephony Integration (CTI) toolbar.

How can I indicate that I am on a break?

Your administrator has configured your system with the break codes appropriate for your organization. To indicate that you’re on a break, select a break type from the available list in the Status area in the upper left corner of your window. Only break types appropriate for your current status appear on the list.

Depending on your computer-telephony (CT) connector configuration and on how your break codes are set up, your break status might not immediately change when you select it if you’re busy with a customer interaction. When you complete the interaction, your status will show that you’re on break and no new interactions will be sent to you. Some sites might restrict breaks when the site is too busy.

What's Contextual Navigation?

Contextual Navigation is a feature of Oracle Sales Cloud CTI that displays a caller appropriate application page based on a set of navigation rules defined for your customer when you answer your phone.

For example, if a customer is calling, contextual navigation rules can determine the contact name or customer ID. Contextual navigation rules determine which navigation/application page will be displayed based on the available call data. The launched page displays the information based on parameters passed in the task flow that is used to launch the page.
12 Managing Forecasts

Sales Forecasting Features: Overview

Forecasting future sales is a method of providing predictions of future revenue for specific time periods. Management uses sales forecast data to set production schedules and volumes, to determine resource requirements, and to report financial guidance to investors.

Summary of Features

The key features of sales forecasting include the following:

- Salespeople can view, manage, and submit their forecasts in the office and using the mobile application. Specifically, salespeople can:
  - Review their forecasted product items and submit the forecast.
  - View their unforecasted pipeline.
  - Use embedded analytics to improve forecast accuracy.

- You can view current, future, and past forecasts. The current forecast is open for editing at certain times and then frozen.

- Sales managers can review and adjust their forecasts wherever they are. They can view the latest forecasting data and compare it to key metrics such as pipeline and won revenue.

- Sales managers can quickly see which salespeople have submitted their forecasts, what has changed since the previous forecast, and the opportunities that comprise the forecast. Sales managers can also drill into their subordinates’ forecasts to view a forecast the same way that the salesperson sees it. This provides sales managers with the opportunity for more effective coaching and greater forecast accuracy.

- Sales managers can add, remove, or adjust individual lines in a salesperson’s forecast, segment the totals by time period, and override forecast totals for each salesperson. Any adjustments are clearly identified throughout the forecast hierarchy, allowing management to quickly view the changes made by sales managers on their team.

- Forecasting reflects any edits made to an opportunity, or any adjustments made at the deal level in real time.

- You forecast sales by territory. The forecasts roll up following the territory hierarchy. Changes to the active territory hierarchy are periodically synchronized with the forecast hierarchy up until a freeze date. After the territory freeze date, salespeople can make changes to their forecasts.

- You can record overlay forecasts on opportunity revenue transactions in addition to the revenue sales credit split. Overlay forecasts allow nonprimary salespeople to forecast sales expectations for all overlay sales credits.

- The forecast for a period is automatically generated from eligible opportunity product items scheduled to close within the period. Forecasts are refreshed from the pipeline revenue in real time. Opportunities and forecast items continue to synchronize until the salesperson submits forecast items for final approval.

- The sales administrator sets the criteria that determine whether a product item is eligible to be automatically included in a forecast.

- The sales administrator provides the option for salespeople to override the established criteria and manually include or exclude a product item from the forecast.
If enabled, you can forecast by product for a territory, forecasting amount and quantity.

Adding Opportunity Items to Your Forecast

Watch: This video tutorial shows you how to add opportunity line items to your sales forecast.

About Forecasting by Territory, Product, or Unit

You can forecast sales by territory and amount, by product and amount, or by product and quantity of units. A forecast covers a specified time period, such as quarter or month. A territory owner submits the current forecast to the owner of the parent territory, who is likely the owner’s manager.

The application generates the forecast by capturing information from opportunity lines as follows:

- Opportunity items are placed in time periods according to the planned or actual close date.
- Only opportunities that meet the forecast criteria are included in a forecast.
- Opportunities assigned to a territory are added to the forecast for that territory.

Forecasting Amounts by Territory

The territory owner forecasts the amount of sales for the territory by time period. The sum of the amounts for all included opportunity items is the forecast amount.

Salespeople and sales managers can then, for their territory:

- Manually add opportunity items to their forecasts or remove them.
- Change the amounts for individual forecast items.
- Make adjustments by changing the total forecast amount for individual time periods for a subordinate's territory forecast.
- Make adjustments to the amounts for a subordinate's forecast items.

Use the Edit Forecast page Territories tab and Forecast Items tab.

Forecasting Amounts by Product

Within the territory, the territory owner forecasts the amount of sales for each product by time period. The forecast amount for each product is the sum of the amounts from opportunity items for that product.

Salespeople and sales managers can then, for their territory:

- Manually add opportunity items to their forecasts or remove them.
- Change the amounts for individual forecast items.
- Make adjustments to the individual product amounts by time period.
- Make adjustments to the amounts for a subordinate's forecast items.
- Make adjustments to the product amounts for a subordinate's territory forecast.

Use the Edit Forecast page Products tab and Forecast Items tab.
Forecasting Unit Quantities by Product
Within the territory, the territory owner forecasts the quantities of each product by time period. The forecast quantity for each product is the sum of the quantities from opportunity items for that product.

Salespeople and sales managers can then, for their territory:

- Manually add opportunity items to their forecasts or remove them.
- Change the quantities for individual forecast items.
- Make adjustments to the individual product quantities by time period.
- Make adjustments to the quantities for a subordinate’s forecast items.

Use the Edit Forecast page Products tab and Forecast Items tab. In the Products tab, select to show Quantity or All Totals.

Managing Your Forecast

Watch: This video tutorial shows you how to manage the forecast for your team.

Sales Forecast Adjustments: Explained
Changes you make to the original forecast up or down are adjustments. If your forecast is by product, then you can adjust quantities as well as the amounts for individual forecast items.

Depending on your configuration, you can adjust the following:

- The amounts for individual forecast items
- The total amounts for each territory owned by your subordinates and by time
- The total amounts by product and also by time period for your territory
- The quantities for individual forecast items
- The total quantities by product and also by time period for your territory

Removing Adjustments
To remove all of your adjustments, go to the Actions menu and select Remove My Adjustments.

Copied Forecasts
If you copy the prior forecast, then your copy takes the total forecast numbers from the previous forecast, including adjustments, and pastes them into your current forecast. These numbers overwrite any calculated totals from rolled up opportunity or adjustment data.

Adjusted Best Case and Worst Case Forecasts
The adjusted best case forecast is the sum of:

- The best case for all forecasted items
• Item-level adjustments for the best case
• Any summary level adjustment to best case

The adjusted worst case forecast is the sum of:
• The worst case values for all forecasted items
• Item-level adjustments for worst case
• Any summary level adjustment to worst case

Notes
If enabled, you can add a note to each forecast item you adjust and add one consolidated note for all summary adjustments. Each note includes who created the note and when you created it. You can edit the notes that you created. Managers and senior management can view notes within their territory hierarchy. You can create notes for the following:

• Forecast Items

A sales manager can add a note to each item included in subordinates’ forecasts provided the item is not in won status. Use the Note column in the Items tab to add, edit, or delete an adjustment note for an item. A VP sees item adjustment notes added by subordinates. When the VP drills down into the manager territory forecast, he can add notes to items.

• Territory Summary

This is a single consolidate note for all the territory summary adjustments that the user can make in the territories tab. A VP sees summary adjustment notes added by subordinates in the territory row of the Territories tab. When the VP drills down into the manager territory forecast, he sees the summary adjustment note added by the subordinate in the Territories tab.

• Product Summary

This is a single consolidate note for the product summary adjustment you create in the products tab. A VP sees summary adjustment notes added by subordinates in the territory row of the Territories tab. When the VP drills down into the manager territory forecast, he sees the summary adjustment note added by the subordinate in the Products tab.

Copying the Prior Forecast: Explained

Use the Copy Prior Forecast action to ignore the rolled up opportunity data and copy the numbers from the previously submitted forecast to the current forecast. Your copy takes the total forecast numbers, including adjustments, and pastes them to your current forecast. These numbers overwrite any calculated totals from rolled up opportunity or adjustment data.

Forecasting Actions and Consequences: Explained

Salespeople modify their active forecasts during the submission window and submit them to their managers. Managers then adjust their forecasts and submit them to their managers.
The user actions described in the following table are available during the submission window, before a user submits his forecast. The only exception is the withdraw action, which is available after the user submits his forecast and before his manager also submits or adjusts her forecast.

<table>
<thead>
<tr>
<th>Role</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Representative</td>
<td>Make changes to opportunities</td>
<td>The forecast is updated to reflect changes.</td>
</tr>
<tr>
<td></td>
<td>Add or remove forecast items</td>
<td></td>
</tr>
<tr>
<td>Sales Representative</td>
<td>Submit his forecast</td>
<td>The forecast is frozen. The salesperson can’t make changes.</td>
</tr>
<tr>
<td>Sales Representative</td>
<td>Withdraw his forecast</td>
<td>The sales representative can again make changes to the forecast and resubmit. Forecast numbers now update from the pipeline.</td>
</tr>
<tr>
<td>Sales Manager</td>
<td>All actions of the sales representative also apply to the sales manager</td>
<td>All results of the sales representative also apply to the sales manager.</td>
</tr>
<tr>
<td>Sales Manager</td>
<td>Adjust numbers for forecast items</td>
<td>If previously unsubmitted, all subordinates’ forecasts are submitted and frozen when the manager edits his forecast. The subordinate’s forecast is frozen and can’t be changed by the subordinate. All direct and indirect subordinates can’t make changes unless the manager removes her adjustments and rejects each subordinate’s forecast. Forecast numbers no longer update from the pipeline. The adjustment becomes the current forecast and ignores the rollup values from current forecast items.</td>
</tr>
<tr>
<td></td>
<td>Adjust totals, including copy previous forecast totals to the current forecast</td>
<td></td>
</tr>
<tr>
<td>Sales Manager</td>
<td>Edit a subordinate’s unsubmitted or rejected forecast</td>
<td>The sales manager acts as the subordinate, therefore all edits and adjustments can be seen by the subordinate. The sales manager can adjust the forecast only if the subordinate is able to adjust his own forecast.</td>
</tr>
<tr>
<td>Sales Manager</td>
<td>Submit a subordinate’s unsubmitted forecast</td>
<td>The subordinate’s forecast is frozen and can’t be changed by the subordinate. All direct and indirect subordinates can’t make changes to the forecast unless the manager removes her adjustments and rejects each subordinate’s forecast. Forecast numbers no longer update from the pipeline.</td>
</tr>
<tr>
<td>Sales Manager</td>
<td>Remove adjustments</td>
<td>Adjustments are removed. Opportunity changes are ignored for as long as the subordinate’s forecast remains submitted.</td>
</tr>
</tbody>
</table>

Oracle Sales Cloud
Using Sales
Chapter 12
Managing Forecasts
# Chapter 12
Managing Forecasts

## Role Action Result

<table>
<thead>
<tr>
<th>Role</th>
<th>Action</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Manager</td>
<td>Reject a subordinate’s forecast</td>
<td>The application will clear all adjustments made by the manager to the subordinate’s forecast. The subordinate can again make changes to the forecast and resubmit. If the subordinate is a sales representative, then the forecast numbers now update from the pipeline.</td>
</tr>
<tr>
<td>Application</td>
<td>The application detects that the submission window has passed</td>
<td>After the end of the submission window, everyone’s current forecast is frozen regardless of submission status. The next forecast is then available to view.</td>
</tr>
<tr>
<td>Application</td>
<td>The application detects that a new submission window has started</td>
<td>At the start of the next submission window, a completely new forecast snapshot is available, and everyone’s forecast is ready to be submitted and adjusted again.</td>
</tr>
</tbody>
</table>

---

## Forecasting: Available Metrics

Metrics provide calculated measures based on historical or current transactional data. Salespeople can refer to metrics when making forecasting decisions. Your administrator enables one or more metrics. Disabling a metric hides the metric from the user interface and speeds up the execution time for certain background processes.

The following table shows the available metrics and how they are calculated:

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Best Case Forecast</td>
<td>The best case forecast metric is the sum of all best case revenue values for all forecast items in the forecast period. You can enter the best case revenue amount when you change the product line details in an opportunity.</td>
</tr>
<tr>
<td>Closed Revenue</td>
<td>The closed revenue metric is actual revenue for the target territory that was closed during the forecast period.</td>
</tr>
<tr>
<td>Estimated Adjustment</td>
<td>The estimated adjustment metric is the sum of the difference between estimated revenue and revenue for all transactions in the forecast period. Sales Predictor uses statistical analysis to provide the estimated revenue amounts based on historical sales for the product.</td>
</tr>
<tr>
<td>Expected Forecast</td>
<td>The expected forecast metric is the sum of all weighted revenue values for all forecast items in the forecast period. Weighted revenue is the revenue amount multiplied by the probability of the deal closing</td>
</tr>
<tr>
<td>Likelihood to Buy Product</td>
<td>The likelihood to buy product metric reflects the percentage of confidence that a deal will close with the specified revenue on the specified close date. Sales prediction uses statistical analysis to provide the likelihood to buy product based on historical sales for the product.</td>
</tr>
</tbody>
</table>
### Metric Table

<table>
<thead>
<tr>
<th>Metric</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pipeline</td>
<td>The pipeline metric is the total revenue amount of all product lines where the Status category is Open, the primary territory is the target territory, and the close date lies in the forecast period. Unforecasted pipeline is the total revenue amount of all product lines without a corresponding forecast item, where the status category is Open, the primary territory is the target territory, and the close date lies in the forecast period.</td>
</tr>
<tr>
<td>Quota</td>
<td>The quota metric is the revenue target associated with the expected performance of a salesperson’s territory for a given forecast period.</td>
</tr>
<tr>
<td>Worst Case Forecast</td>
<td>The worst case forecast metric is the sum of all worst case revenue values for all forecast items in the forecast period. You can enter the worst case revenue amount when you change the product details in an opportunity.</td>
</tr>
</tbody>
</table>

### FAQs for Managing Forecasts

**How can I add forecast items to a forecast?**

To add forecast items to a forecast, search for product lines in your territory and add them to the forecast. For any forecast item with a warning icon, you must change any attributes that don’t meet the forecast criteria. When all attributes fall within the forecast criteria, the product item becomes part of your forecast.

You can also use a forecast override if the administrator enabled it for your territory. You can set the Forecast Option to Always to override the lack of matching forecast criteria. An icon warns you when a revenue item doesn’t match the forecast criteria and requires the forecast override.

If you are unable to edit the forecast item you are adding, then the item is added with the unadjusted forecast amount set to zero. However, the item now has a positive adjustment amount to match the original revenue item revenue amount. For example, if the revenue amount is 3,000, then the unadjusted forecast is 0, the forecast adjustment is 3,000, and the adjusted forecast is 3,000. You can further refine the adjusted forecast item amount, or remove the forecast item if you no longer want the item included in the forecast.

**How can I remove forecast items from a forecast?**

Select the forecast item and click the remove icon. For any product item with a warning icon, you must change any attributes so that the product item doesn’t meet the forecast criteria or so that the forecast item no longer closes within the forecasting period. To see your deleted items, choose Dropped Forecast Items from the Show list. You can then add any dropped items back to your forecast by clicking the add icon for the item.

You can also use a forecast override if the administrator enabled it for your territory. You can set the Forecast Option to Never to override the matching forecast criteria. An icon warns you when a product item matches the forecast criteria and requires the forecast override.

If you are unable to either change the forecast criteria for the item or use the override, the item disappears from your forecast items list, but the unadjusted forecast amounts remain the same. However, the item now has negative adjustment amounts to match the unadjusted forecast amounts. For example, if the unadjusted forecast amount is 3,000, then the forecast...
adjustment is negative 3,000 and the adjusted forecast is 0. With the removed forecast item selected, you can add it back in if you want to include the item back in the forecast.

When does my forecast appear in my currency?

Your forecast appears in your preferred currency. You can select a different currency from the Currency list. Your selected currency also applies to your view of subordinate forecasts. However, the currency selection does not apply to any custom BI graphs or reports that were added to the forecasting screens.

When do I submit my forecast?

You can make changes to your forecast and submit it during the submission window. You can submit your child territory forecasts on behalf of your subordinates and then make adjustments to your forecast before submitting.

What happens if I submit my forecast?

You can’t make adjustments or update your forecast after you submit it. Your manager can make adjustments to your forecast only after your submission. If your manager rejects your forecast, you can make further changes to the rejected forecast and then resubmit it.

What happens if I select Forecasted by Parent Territory?

The territory is hidden in the Forecasting Overview page, but is available on the Edit Forecast page. The owner of the parent territory can submit the forecast for the child territory. If the child territory owner also owns the parent territory, then the territory owner can edit forecast items, add and remove forecast items as adjustments, and adjust the territory forecast.
13 Using Sales Prediction

Sales Prediction: Overview

Sales prediction features enable organizations to capture and leverage predictive sales intelligence. Predictive models analyze sales data to evaluate buying patterns. After the evaluation of model results, lead generation can be scheduled to disseminate lead recommendations to users. Each lead recommendation includes win likelihood, average expected revenue, and sales cycle duration.

Summary of Features

This table lists sales prediction features.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Predictive Analytical Reports</td>
<td>These reports provide sales analysts with a summary of the prediction model results. Additionally, reports on the dashboard provide overviews of model performance and leads adoption.</td>
</tr>
<tr>
<td>Predictive Model Learning</td>
<td>Model learning uncovers hidden customer buying patterns. Salespeople can replicate sales success using historical insight generated through model training.</td>
</tr>
<tr>
<td>Rule-based Recommendations</td>
<td>When new products are launched or during initial deployment, historical data is sparse. In such cases, the sales analyst can create customer-, industry-, or product-specific rules to drive the recommendation of new products.</td>
</tr>
<tr>
<td>Higher Lead Adoption Rate</td>
<td>By utilizing a combination of data mining, segmentation, prediction and business rules, sales prediction functionality ensures that the recommendations have a higher likelihood of being converted to a win.</td>
</tr>
<tr>
<td>Analyze Recommendation Performance</td>
<td>Built-in analytical reports verify whether the recommendations are being accepted by the sales organization. If adoption is low, then the predictive models can be fine-tuned by selecting different attributes for model learning or editing the rules. Simulation can then be performed to assess the impact of these new changes before publishing new recommendations.</td>
</tr>
<tr>
<td>Usage across Oracle Sales Cloud Service</td>
<td>The recommendations generated can be viewed when using other Sales Cloud capabilities such as managing customers and contacts. When reviewing customer details, recommended products display next to the customer with the rationale for the recommendation. Territory managers can use sales prediction metrics to set sales targets by territory and assign them to sales people. Metrics ranking also determines whether leads can be qualified during the lead qualification process.</td>
</tr>
</tbody>
</table>
Understanding Buying Patterns of Your Customer: Overview

Sales administrators and sales representatives can view predictive product recommendations based on customer assets and historical buying trends. You can click the Customer Asset Analysis tab on the Recommendations work area to analyze information about customers and provide intelligent product recommendations. Access the many reports to analyze customer buying trends across many attributes, such as currently owned products, industry, company size, and geography. To identify customer buying trends, click the Buying Patterns tab. From here you can analyze how the different attributes can affect different product purchases. You can then use attributes identified by the buying pattern reports to build the criteria for creating prediction rules.

Sales Prediction Rules: Explained

This topic explains the types of rules used in sales prediction. Use rules to identify target customer segments for target products. The results provide salespeople with quality leads with the best products to sell to specific accounts.

Sales prediction features enable you to create two types of rules:

- Prediction rules
- Eligibility rules

Prediction Rules

Products with little or no past sales history, products that need to be promoted due to lack of demand, and products that must align with marketing initiatives are some of the situations where a company might create prediction rules. Many companies have product experts who have deep market and industry insight about the best customers they should target for their products. They use the information provided by the data mining model to validate their knowledge and to extract correlation patterns. Then they write their own prediction rules to control product recommendations and predictions. For example, you can create a prediction rule to recommend a new mobile product called Mobile Talk that has no historical data, to customers of a specific age group.

Eligibility Rules

You can create an eligibility rule to define conditions that a customer must meet to be eligible for a product recommendation. Eligibility rules apply to both prediction rules and models. You can have rules which prevent the sale of certain products to certain customers. Management of eligibility rules can ensure the model derived recommendations don’t inadvertently violate these rules. For example, you can have an eligibility rule that ensures that you do not recommend the Mobile Talk mobile to customers in Asia because it will not work there. Achieving sales objectives through prediction rules and compliance with sales policies by eligibility rules help determine which products to select for recommendations. Eligibility rules always win over prediction models and rules.

Related Topics

- What happens if a prediction rule conflicts with another prediction rule?
Reviewing and Modifying Prediction Rules: Explained

Use rules to identify target customer segments for target products. The results provide salespeople with quality leads with the best products to sell to specific accounts. You can view and create rules from the Manage Rules tab in the Recommendations work area. You can identify target products or product groups to apply to the rule. The attributes of the targeted customer are listed as identified by the sales predictor analysis.

To review or modify an existing rule, do the following:

1. Sign in as a sales user, such as a sales administrator or sales analyst.
2. Navigate to Sales - Recommendations.
   The Customer Asset Analysis page displays.
3. Click Manage Rules from the graphic panel to display the Manage Rules page.
4. Double-click one of the existing rules and the Edit Recommendation page for the rule is displayed.
5. Review or modify the rule criteria, such as the Rule Name, and specify the Rule Folder. You also select or modify the existing products and customers you want to target.
6. Click Save and Close if you make any changes. Otherwise, click Cancel.

Selecting Products for Recommendations: Points to Consider

You may have numerous products in your sales catalog, but 20% of the products usually generate 80% of the revenue. You can train models and write prediction rules or eligibility rules only for those products that are selected for recommendations. Also, you can only generate leads for products selected for recommendation.

Sales Focus

Product selections should be based on your business objectives. For example, if you want to increase sales for poorly performing products or to achieve inventory reduction goals, your product selections can be used to generate leads to achieve those objectives. Once you select a set of products for recommendation, you can create prediction rules to meet sales objectives, particularly for new products or in cases where historical sales data is insufficient to generate useful correlation statistics.

You can change the products or product groups selected as the business needs and market conditions change. A product that is currently in high demand may have no buyers within 12 months and so you have the flexibility to update the products in the set of recommendable products.
Product Hierarchy Level
Sales prediction capabilities allow you to manage the set of products available for recommendation at any level in the product hierarchy and predict recommendations at that level.

For example, in the hierarchy above, if you want to select a product called Vision HDTV LED television, you can either select the specific product, or select product groups higher in the product hierarchy, such as Television or Home Audio/Video. You can decide the level at which you want to generate recommendations and enforce that decision for sales prediction.

Eligibility
Additionally, you can create eligibility rules which prevent the sale of certain products within customer segments.

White Space Analysis

About White Space Analysis Report
The white space analysis report identifies suggested recommendations for accounts that you have access to in a business to business (B2B) setting. By using this report, you can focus on selling products or product groups that have the highest potential for generating revenue. You can view the white space analysis report from a tab on Accounts.

Profile Option
The white space analysis report data is derived from rule-based recommendations and leads of status qualified or unqualified generated within the last 90 days for the accounts in your territory. The 90 days is a configurable profile option and 90 days is the preset setting.
Report View
The report lists all recommendations and leads found by the highest revenue potential and displays accounts listed in descending order of revenue. If more than six accounts with recommendation and lead potential are found, the report displays only the top six accounts sorted by revenue in descending order.

If no recommendation or lead is found for an account, then a message is displayed to inform you that no recommendations and leads are found. If at least one account and product is found with an asset, opportunity, lead or recommendation, then the report is generated.

Note: You cannot select more than a total of six accounts, or six products, or six product groups for inclusion in the white space analysis report.

Using the White Space Analysis Report for Cross Sell or Up Sell

Watch: This tutorial shows how you can use Oracle Sales Cloud to easily use the white space analysis report to focus on selling products or product groups to accounts that have the highest revenue potential.

White Space Analysis Report Actions
Access the white space analysis to review ongoing leads, opportunities and recommendations, and take actions to move them along the sales pipeline. You can also evaluate what actions to take on the recommended products to increase the sales pipeline potential and sell more products to your accounts.

Accounts
Depending on your specific requirements, you can focus on deals with the highest value. You can select up to six accounts within your territory and focus on the account with the highest potential.

Product and Product Groups
If you want to analyze specific product or product group, then you can also select up to a maximum of six products or six product groups that are within and outside your territory.

Leads and Opportunities
You can navigate to a specific lead or opportunity from the white space analysis report by clicking on an icon to take you to the appropriate UI. From the appropriate UI, you can perform specific actions on the lead or opportunity. Click Save and Close, or Cancel, to return to the white space analysis report.

Recommended Actions
You can take actions on the recommended products to increase the sales pipeline potential and sell more products to your customers. You can click on a cell with a recommendation on the white space analysis report and take actions on the specific recommendation in order to meet your sales targets. You can perform one of three possible actions depending on the configuration setup:

- Convert to Lead
• Convert to Opportunity
• Reject recommendation and specify a reason for rejection from preset values or customized values.

The following figure shows an example of the Recommendation screen with the Actions menu items displayed.

![Recommendation Screen](image)

**Displaying Latest White Space Analysis Data**

Leads, opportunities, and asset information is always up to date when the white space report is accessed. Recommendations can be out of synchronization with the white space analysis report based on when the lead generation job was last run by the sales analyst. The Recommendations Last Updated time stamp, displayed at the bottom of the report, indicates the time the recommendations were last generated. This helps ensure that the set of recommendation available for accounts is always up to date.

In case a lead generation job might have completed since you last accessed the report, click **Reset** to update the white space analysis report and view the top six accounts by revenue. If applicable, the latest changes to the set of accounts and products are displayed. Any prior changes you might have to the report such as adding accounts or products will be lost and the updated report will not reflect such changes. Note also that the time the report is reset is not indicated.

**How can I access the white space analysis report?**

You access the white space analysis report from a tab under Accounts. The tab is not available out of the box and needs to be enabled. The first time you access the white space analysis report you see either a maximum of six accounts and six products in a grid format or a message that indicates there are no leads or recommendations to display. The report contains recommendations and leads based on sales predictions rules so that you can take immediate actions based on the analysis on the report.

If you close the initial report without taking any actions, then once you sign out of the application, the same set of accounts and products or product groups are displayed the next time you sign in.

**Related Topics**

• Enabling White Space Analysis Report Tab in Accounts: Procedure
What data can I view from the white space analysis report?

You can view the white space analysis report for the accounts that you have access to. The white space analysis displays the following objects in order of priority for the accounts and products within and outside your territories:

- Assets
- Opportunities
- Leads
- Rule-based recommendations
- Rejected recommendations
- White space

If there are multiple leads and opportunities for the same account and products, then the last updated lead and opportunity can be viewed.

⚠️ **Note:** If a recommendation has been rejected, the cell in the report is disabled and color coded visually and no further action can be taken on the recommendation.

The following is an example of the white space analysis report.

![White Space Analysis](image)

Leads with a status of Retired and Opportunities with a status of Lost and No Sales are not displayed on the report.
What happens when I click a recommendation from the white space analysis report?

Depending on your configuration, when you click on a recommendation from the white space analysis report, you can take actions on the specific recommendation. For example, in order to meet your sales targets, your administrator might configure recommendation actions to allow you do one of the following:

- Convert a recommendation to a lead
- Convert a recommendation to an opportunity
- Reject a recommendation and specify the reason

Can I reject recommendations that are no longer relevant?

Yes. All recommendations may not be suitable for your accounts. For example, customers may have bought a competing product in the last few weeks and that information is typically not available in your data. You can reject recommendations displayed in the white space analysis report to allow you focus on the products that you are more likely to sell to your customer.

How is the deal size calculated for a white space analysis report?

Sales representatives are interested in the deal size for recommendations, leads, and opportunities so that they can focus on the deals with the highest value. The deal size is always displayed in the corporate currency.

The deal size for a recommendation is computed as the estimated revenue of the recommendation multiplied by the win percentage (%) of the recommendation. The deal size for a lead or an opportunity is computed as the amount for the specific product represented by the column of the report in the product details. Total potential is the sum of revenue values for recommendations, leads, and opportunities for an account across the six products or product groups displayed in the report.
14 Using Territories

Using Territories: Overview

Territories provide the rules for automatically assigning salespeople and other resources to accounts, contacts, households, partners, leads, and opportunity items.

Salesperson

As a salesperson viewing an account, partner, lead, or opportunity, you can see the assigned territories when you view the sales team information. You also forecast your sales by territory. Sales quotas can be assigned to you by territory.

Sales Managers

As a sales manager, you can modify the territories in the hierarchies below your assigned territories. Following are some examples of changes you can make to territories:

- Add a new child territory.
- Change the owner of an existing territory.
- Add team members to a territory.
- Remove an existing territory.
- Add specific accounts, contacts, and households to the coverage of a territory.
- Exclude specific accounts, contacts, and households from the coverage of a territory.
- Define or change the definition of a territory coverage.

You can change an active territory directly without using a territory proposal. You can:

- View a list of territories.
- Look at the details for a territory.
- Use the Summary tab to change attributes of the territory.
- Use the Coverage tab to modify the boundaries of the territory.
- Use the Team Members tab to change team members or the territory owner.
- Use the Child Territories tab to navigate the territory hierarchy and to add a new territory.

See the Oracle Sales Cloud Implementation Guide for additional information about modifying territories.

Using Simplified Territory Management

Watch: This tutorial introduces you to the UI used for managing active territories without using territory proposals.
Changing Territories

Creating a Territory Proposal

You can update active territories directly, or use a territory proposal as a sandbox where you make your proposed changes to your territory hierarchy before activating the changes.

Tip: Use proposals for territory realignments or changes to be activated at a future date.

1. Navigate to Territories.
2. In the Tasks region, select the Manage Territory Proposals link.
   The Manage Territory Proposals page appears.
3. In the Current Territory Proposals region, click Create.
   The Create Territory Proposal window appears.
4. Enter a name for the proposal.
5. You can enter an Activation Date or accept the default which is immediate activation.
6. Click Save and View.

Your territory proposal opens and displays your current territory hierarchy. You can start making your changes.

Adding Child Territories to Your Territory Hierarchy

You can add child territories to your own territory or to another territory in your hierarchy.

Changing Active Territories

Use the following steps to add or change a territory that becomes immediately active.

1. Select from your territories list the territory that will be the parent to your new territory.
2. Go to the Hierarchy tab.
3. Click Create Territory.
4. Enter the territory name.
5. Select the owner for the territory.
6. Click Save and Continue.
7. Go to the Coverage tab.
8. To change dimension definitions, click Edit.
9. Select a dimension and move desired values to the Selected column.
10. Optionally, click Edit and enter several members or ranges of members separated by commas and click OK.
11. Click OK.
12. To add an account, click Add Customers and select Accounts.
13. When you complete making all changes, click Save and Close.

Your new territory is now active.
Using Territory Proposals

Use the following steps to add territories using a territory proposal you created.

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 Child.
4. Enter the territory name.
5. Select the owner for the territory.
6. Click Save and Close.
   The new territory is added to the proposal.
7. Click Edit Coverage.
   The coverage for the child territory is the same as the parent’s coverage.
8. Select the members for each dimension that you want to change.
9. Click Save and Close.

Changing Territory Coverage

A new child territory has the same coverage as the parent. Change dimension selections and included or excluded accounts, contacts, and households to refine the coverage. Your changes are not active until you activate the proposal.

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. If the territory is not already added to the proposal, then click Add to Proposal.
4. Click Edit Coverage.
   The Edit Coverage window 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.
   c. Optionally, click Add Members in Bulk and enter several members or ranges of members separated by commas and click OK.
   d. Click Save and Close.
6. In the Included Customers region, select and add specific accounts, contacts, and households to include in the territory.
7. In the Excluded Customers region, select and add specific accounts, contacts, and households to exclude from the territory.
8. Click Done.
Activating a Territory Proposal

When you finish making changes to your territories, use this procedure to activate your territory proposal and start using the new territories for assignment.

1. Navigate to Territories.
2. In the Tasks region, click Manage Territory Proposals.
   
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.
   
   You can see the activation process status in the Details region of your proposal.
5. Click Done to return to Manage Proposals.
6. Click Done to return to the Overview page. Your territory changes now appear in the list of active territories.

Territories Defined by Dimensions: Explained

Dimensions define territory boundaries. For example, you use the geography dimension to define territories by assigning specified countries, states, and postal codes. You define territory dimensions to assign customers, partners, leads, and opportunity items to the correct territories.

A territory captures business objects, such as customers, that fall within the defined boundaries of the territory.

The following figure shows a geography example. The sales team assigned to this territory is responsible for all customers in Spain. In this example, the Spain Territory is assigned Customer A, but not Customer B.

Customers and Partners

You can define a territory either for partners or for customers, but not for both. You select either Customer Centric or Partner Centric for the coverage model. When creating a territory, you can include individual customers or partners by selecting them for the territory coverage. You can use the following dimensions to assign customers or partners to a territory:

- 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

Your administrator can also use classification categories to define up to three additional dimensions. The definitions are based on classifications to assign customers or partners.

**Leads and Opportunities**

A territory is assigned to leads and opportunities using the attributes of the customer or partner on the transaction and attributes of the transaction itself, shown in the following list.

You can use the additional dimensions to assign leads and opportunity items:

- Business unit
- Product

  Groups of products form a hierarchy in the sales catalog.

- Sales channel

  The available sales channels are Direct, Indirect, and Partner.

For example, your company is launching a new product line in all countries. One sales manager with a small sales team will specialize in selling only the new product line. The sales manager’s territory is defined only by the new product line and geography set to Any.

One of the salespeople reporting to this manager sells the new product line in Canada. The following figure shows the salesperson’s territory and an opportunity item assigned to the territory:
Tip: You can use the Line of Business attribute to assign leads or opportunities to a territory, although it’s not a dimension.

Related Topics

- Territory Coverage: Explained
15 Using Analytics

Overview

Oracle Sales Cloud Analytics provide insight for your organization at all levels, whether you are administering analytics for a VP, a sales representative, or a sales manager, they will stay informed, and use this information to drive sales forward. The key analytics features include:

- Over 150 prebuilt analyses- Provide key performance indicators (KPIs) for various sales roles in your organization, or create your own or modify existing analyses.
- One-click toggle between and pre-built or custom sales infolet pages.
- Business intelligence (BI) catalog - Access, create, and edit analyses.

A Quick Look at the Analytics Interfaces

With Oracle Sales Cloud Analytics there two basic interfaces for viewing analytics.

Interfaces where users view analytics:

- The Sales Infolet Pages
  - One out-of-the box Sales Infolet page with prebuilt infolets populated with key metrics specific to user roles. You can also enable five additional sales infolet pages and customize the layout and infolet content.
- The Analytics page
  - Users access this page and search and make favorite their analytics.

**Note:** Depending on your implementation and software version, some page icons, menu links, and navigator options may not be available.

When users open your application, they land on the Welcome Springboard page. The following roles have their own customized analyses:

- Sales Representative
- Sales VP
- Sales Manager
- Channel Manager

The Sales Infolets pages do not show until you enable them. For instructions on enabling the Sales Infolets see Chapter 5, "Enabling Your Sales Infolet Page."
Accessing Sales Infolet Pages

From the Welcome Springboard using the white dot links just below the search field you navigate to Infolet summaries customized for the sales roles in your organization. These infolet analyses are available on mobile, tablet, or laptop. Clicking on an infolet drills down to more detail on that report.

This figure shows the Sales Infolet Page with key analyses.

Accessing Analytics Pages

From the landing springboard click Sales and then click Analytics. Users manage their own analyses on this page. Here they can view Favorites, or recently viewed analyses. There are also tools to print or email their analyses, as well as search for available analyses.
This figure shows the Analytics page, with the various icons for viewing analytics such as Add and Remove from Favorites, Email, Report View, and Search options.

Users can add favorites to this list by searching for report names, and clicking the gold star to the right of the report name. Once they add a favorite, it is always available to view from their Analytics page.

## Analyses for Sales Representatives

This table lists the analyses that are designed for sales representatives. They can see how they are doing against their quotas, open opportunities, how long it takes to close deals, and deals in the pipeline, and much more.

### Standard Analyses for Sales Representatives

The following table contains analyses stored in BI under ..Sales/Embedded Content/ Sales Representative.

<table>
<thead>
<tr>
<th>Report Title</th>
<th>Report Description</th>
<th>Column Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Forecast vs. Open Pipeline</td>
<td>Shows what is in the pipeline against the forecasted revenue for the selected period. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information such as Forecast, Adjusted Forecast, Won Revenue, Open Pipeline, and Forecast Period.</td>
</tr>
<tr>
<td>Report Title</td>
<td>Report Description</td>
<td>Column Names</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>-------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>My Open Leads by Age</td>
<td>Shows the age of open leads in the pipeline. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information such as Lead Age (days), Lead Count, Deal Size, number of Leads, and Total Leads.</td>
</tr>
<tr>
<td>My Open leads by Source</td>
<td>Shows open leads and the lead origin. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information such as Lead Count, Deal size, number of Open Leads, number of Leads, Time frame, Lead Source, Source, and Age.</td>
</tr>
<tr>
<td>My Open Tasks</td>
<td>Shows tasks such as call, chat meeting, not specified, that still need to be completed. Sales reps use this analysis to plan their workload, and adjust schedules, and identify overdue tasks.</td>
<td>Uses key information for analysis display such as Number of Tasks, Activity Type, and Due Date. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
</tr>
<tr>
<td>My Performance</td>
<td>Shows how sales rep is performing. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such Enterprise Quarter, Target Quota, Won Revenue, Remaining Quota, Quota Attainment, and Axis Limit.</td>
</tr>
<tr>
<td>My Pipeline</td>
<td>Shows opportunities that are stuck in the pipeline. Shows if there is enough open opportunity to meet forecasted targets. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Sales Stage, Sales Stage Name, Sales Stage Row ID, Amount, Open Pipeline, Won Revenue % of Total Attainment, Closed Opportunity Line Revenue, Total Revenue, Pipeline Facts, Employee.</td>
</tr>
<tr>
<td>My Stalled Opportunities</td>
<td>Shows open owned opportunities that are stalled. Stalled is defined as open for a time period longer than the average duration of the sales stage. Sorted descending by days stalled. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Win %, Name, Opportunity ID, Account, Customer Row ID, Customer Type Code, Sales Stage, Pipeline Days, Close Date, Pipeline Amount</td>
</tr>
<tr>
<td>My Top Accounts by Open Opportunities</td>
<td>Shows where accounts are based on open opportunities. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Open Opportunity Line Revenue, Number of Open Opportunities, Customer Name, Customer Row ID, Customer Type Code.</td>
</tr>
<tr>
<td>My Top Open Opportunities</td>
<td>Shows top opportunities currently in the pipeline. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Win %, Name, Opportunity ID, Account, Customer Row ID, Customer Type Code, Primary Contact, Contact Row ID, Sales Stage, Close Date, Amount.</td>
</tr>
<tr>
<td>My Unaccepted Leads by Age</td>
<td>Shows leads in the pipeline that are still in-progress, and have not closed. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Lead Age, Lead Count, Lead Count, Deal Size, Number of Leads, Lead Age.</td>
</tr>
<tr>
<td>Report Title</td>
<td>Report Description</td>
<td>Column Names</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>-------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>My Won Opportunities</td>
<td>Shows top opportunities that have been closed. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Name, Opportunity ID, Account, Customer Row ID, Customer Type Code, Primary Contact, Contact Row ID, Amount, Close Date.</td>
</tr>
<tr>
<td>My Top Accounts by My Activities</td>
<td>Shows top accounts with the most activity by this logged in user. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Number of Activities, Call, Chat, Demo, Email Meeting, Not Specified, Others, Customer Name, Customer Row ID, Customer Type Code.</td>
</tr>
<tr>
<td>My Actuals vs. Quota Tile</td>
<td>Shows won revenue against revenue quota. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Resource Quota, Won Revenue, and Attainment Percent.</td>
</tr>
<tr>
<td>My Forecast vs. Open Pipeline Tile</td>
<td>Shows if there is enough open opportunities in the pipeline to meet forecasts. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Revenue Forecast Facts, Forecast.</td>
</tr>
<tr>
<td>My Open Leads Tile</td>
<td>Shows open leads. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Lead Facts, Lead Count.</td>
</tr>
<tr>
<td>My Pipeline Tile</td>
<td>Shows deals in the pipeline. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Pipeline Detail Facts, Open Revenue, and Deal Count.</td>
</tr>
<tr>
<td>My Stalled Opportunities Tile</td>
<td>Shows deals stuck in the pipeline. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Pipeline Facts, Opportunity Revenue, Deal Count, and Opportunity ID.</td>
</tr>
<tr>
<td>My Top Open Opportunities Tile</td>
<td>Shows top open deals in the pipeline. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Pipeline Detail Facts, Open Revenue, and Deal Count.</td>
</tr>
<tr>
<td>My Performance Tile</td>
<td>Shows how sales rep is performing. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Employee Name, Rank, Won Revenue, Resource Quota, Quota Attainment.</td>
</tr>
</tbody>
</table>
Analyses for Sales Managers

This table lists the analyses designed to help sales managers in their day-to-day team management and decision-making. They can see how their teams are doing against their quotas, open opportunities, how long it takes to close deals, and deals in the pipeline, and much more.

Standard Analysis for Sales Managers

The following table contains analyses stored in BI under ..Sales/Embedded Content/ Sales Manager.

<table>
<thead>
<tr>
<th>Report Title</th>
<th>Report Description</th>
<th>Column Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Teams Activities (By Type)</td>
<td>Allows managers to ensure the workload is appropriately distributed and actively highlight any issues. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as # of Activities, Call, Chat, Demo, Email Meeting, Not Specified, Others, Customer Name, Customer Row ID, Customer Type Code.</td>
</tr>
<tr>
<td>My Team’s Leads</td>
<td>How many leads does my team currently have. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Deal Size, # of Leads, Age, Name, Rank, Customer Row ID, Employee, Lead Status, Time frame, Lead Channel, Lead ID, Account.</td>
</tr>
<tr>
<td>Team Leadership Board</td>
<td>Shows the leaders of a sales team. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Employee name, Employee Row ID, Won Revenue, Closed Opportunity Line Revenue, Target Quota, Quota Attainment.</td>
</tr>
<tr>
<td>My Team’s Performance</td>
<td>Shows opportunities that are stuck in the pipeline. Shows if there is enough open opportunity to meet forecasted targets. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Sales Stage, Sales Stage Name, Sales Stage Row ID, Amount, Open Pipeline, Won Revenue % of Total Attainment, Closed Opportunity Line Revenue, Total Revenue, Pipeline Facts, Employee.</td>
</tr>
<tr>
<td>My Team’s Top Open Opportunities</td>
<td>Shows top open opportunities of a sales team. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Open Opportunity Line Revenue, # of Open Opportunities, Customer Name, Customer Row ID, Customer Type Code.</td>
</tr>
<tr>
<td>My Team’s Tasks on Open Opportunities</td>
<td>Shows top opportunities currently in the pipeline. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Tasks on Open Opportunity, Completed Tasks on Open Opportunities, % Completion, Enterprise Quarter, Employee First Name, Employee Last Name, Employee Row ID, Opportunity Status Category.</td>
</tr>
<tr>
<td>Top Accounts by My Team’s Activities</td>
<td>Shows top accounts with the most activity by this logged in user. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as # of Activities, Call, Chat, Demo, Email Meeting, Not Specified, Others,</td>
</tr>
</tbody>
</table>

194
<table>
<thead>
<tr>
<th>Report Title</th>
<th>Report Description</th>
<th>Column Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Team’s Actuals vs. Quota Tile</td>
<td>Shows team won revenue against revenue quota. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Resource Quota, Won Revenue, and Attainment Percent</td>
</tr>
<tr>
<td>My Teams Forecast vs. Open Pipeline Tile</td>
<td>Shows if the team has enough open opportunities in the team pipeline to meet forecasts. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Resource Quota, Won Revenue, and Attainment Percent</td>
</tr>
<tr>
<td>My Team’s Leads Tile</td>
<td>Shows team open leads. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Revenue Forecast Facts, Forecast.</td>
</tr>
<tr>
<td>My Team’s Performance Tile</td>
<td>Shows how the sales team is performing. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Employee Name, Rank, Won Revenue, Resource Quota, Quota Attainment.</td>
</tr>
<tr>
<td>My Team’s Pipeline Tile</td>
<td>Shows team’s opportunities that are stuck in the pipeline. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Open Revenue, and Deal Count</td>
</tr>
<tr>
<td>My Team’s Open Opportunities Tile</td>
<td>Shows top open opportunities of a sales team. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Open Revenue, and Deal Count.</td>
</tr>
<tr>
<td>Customer Asset Analysis</td>
<td>Shows customer assets on the books by customer name and quantity. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Product Name, Quantity of Assets, Product Count, Customer and Asset Purchase Date.</td>
</tr>
</tbody>
</table>
Analyses for Channel Account Managers

This table lists the analyses that are designed to help Channel Account Managers in their day-to-day management and monitoring of their channel partners. They can see how their partners are doing against their quotas, open opportunities, how long it takes to close deals, and deals in the pipeline, and much more.

Analysis Listing for Channel Account Managers

The following table contains analyses stored in BI under /Shared Folders/Sales/Embedded Content/Channel Account Manager. Where indicated, reports can be added to the Sales Infolet page for Channel Account Managers. Other reports can be exposed on the Analytics work area, or added to Analytics side tabs in object work area details pages.

<table>
<thead>
<tr>
<th>Report Title</th>
<th>Report Description</th>
<th>Column Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual vs. Quota Tile</td>
<td>For the current quarter, this infolet shows the total quota assigned to the logged-in Channel Account Manager, along with the actual revenue won by the partners of the Channel Account Manager. This analysis is exposed on the Sales Infolets page.</td>
<td>Uses key information such as Resource Quota, and Pipeline Won Revenue.</td>
</tr>
<tr>
<td>Actual vs. Quota</td>
<td>The detail report includes a gauge that displays the percentage of quota attained in the current quarter.</td>
<td>Uses key information such as Enterprise Quarter, Won Revenue, Target Quota, Pipeline Detail Facts, and Resource Quota.</td>
</tr>
<tr>
<td>Deal Registration Tile</td>
<td>This infolet shows &quot;pending approval&quot; deal registrations that are submitted by partners who the Channel Account Manager has access to.</td>
<td>Uses key information such as Submitted Date, Partner, Registration Number, Customer, Deal Size, and Close Date.</td>
</tr>
<tr>
<td>Deal Registration</td>
<td>Shows the deals registered in the pipeline. This analysis is filtered to display only those partners where the logged-in user is part of the account team.</td>
<td>Uses key information such as Submitted Date, Partner, Registration Number, Customer, Deal Size, and Close Date.</td>
</tr>
<tr>
<td>MDF Requests for CAM Tile</td>
<td>This infolet shows &quot;pending approval&quot; MDF requests submitted by partners owned by the logged-in Channel Account Manager. This analysis is available, but not automatically displayed, on the Sales Infolets page.</td>
<td>Uses key information such as Submitted Requests (Amount), Requests Pending Approval (Amount), Approved Requests (Amount), Claims Pending Approval, Approved Claims, and Settled Amount.</td>
</tr>
<tr>
<td>MDF Detail Report for CAM</td>
<td>Shows &quot;pending approval&quot; MDF requests submitted by partners owned by the logged-in Channel Account Manager.</td>
<td>Uses key information such as Submitted Requests (Amount), Requests Pending Approval (Amount), Approved Requests (Amount), Claims Pending Approval, Approved Claims, and Settled Amount.</td>
</tr>
<tr>
<td>Report Title</td>
<td>Report Description</td>
<td>Column Names</td>
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</tr>
<tr>
<td>Open Pipeline Tile</td>
<td>This infolet shows the total revenue and the number of open opportunities closing in the current and next quarter from partners owned by the logged-in Channel Account Manager.</td>
<td>Uses key information for analysis display such as Pipeline Revenue, and Count.</td>
</tr>
<tr>
<td></td>
<td>This analysis is exposed on the Sales Infolets page.</td>
<td></td>
</tr>
<tr>
<td>Opportunities By Stage</td>
<td>Shows the open opportunities in the pipeline and the stage of the pipeline they are currently in. This analysis is filtered to display only those partners where the logged-in user is part of the account team.</td>
<td>Uses key information such as Historical Sales Stage, Win Rate, Amount in the Pipeline, Opportunity Name, and Customer Name.</td>
</tr>
<tr>
<td></td>
<td>This analysis is exposed on the Sales Infolets page.</td>
<td></td>
</tr>
<tr>
<td>Opportunities By Stage</td>
<td>Shows the open opportunities in the pipeline, the partner, and the stage of the pipeline they are currently in. This analysis is filtered to display only those partners where the logged-in user is part of the account team.</td>
<td>Uses key information such as Partner name, Historical Sales Stage, Win Rate, Amount in the Pipeline, Opportunity Name, and Customer Name.</td>
</tr>
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</tr>
<tr>
<td>Partner Performance Tile</td>
<td>This infolet shows the name of the top performing partner and the amount of won revenue in the current quarter. This analysis is filtered to display only those partners owned by the logged-in Channel Account Manager.</td>
<td>Uses key information such as Partner Name, Partner ID, and Partner Status.</td>
</tr>
<tr>
<td></td>
<td>This analysis is exposed on the Sales Infolets page.</td>
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</tr>
<tr>
<td>Partner Performance</td>
<td>Shows top performing partners by amount of revenue closed at this time. This analysis is filtered to display only those partners where the logged-in user is part of the account team.</td>
<td>Uses key information such as Partner Name, Amount Won, and Number of Opportunities Won.</td>
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</tr>
<tr>
<td>Partner Status Tile</td>
<td>This infolet shows the number of partners who are currently awaiting activation by the channel manager organization. This analysis is filtered to display only those partners where the logged-in user is part of the account team.</td>
<td>Uses key information such as Partner Amount, and Partner name.</td>
</tr>
<tr>
<td></td>
<td>This analysis is available, but not automatically displayed, on the Sales Infolets page.</td>
<td></td>
</tr>
<tr>
<td>Partner Status</td>
<td>Shows the number of partners that are currently awaiting activation for the channel manager organization. This analysis is filtered to display only those partners where the logged-in user is part of the account team.</td>
<td>Uses key information such as Partner Name, Partner ID, and Partner Status.</td>
</tr>
<tr>
<td>Report Title</td>
<td>Report Description</td>
<td>Column Names</td>
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<tr>
<td>------------------------------</td>
<td>-------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Partner’s Pipeline by Partner</td>
<td>Shows each partner, and the amount of revenue in their pipeline by pipeline stage.</td>
<td>Uses key information such as Partner Name, Pipeline Amount, Open Pipeline, Won</td>
</tr>
<tr>
<td></td>
<td>It also shows total revenue in the pipeline, open revenue, and won revenue for partners</td>
<td>Revenue, Total Revenue, and Opportunity Line Revenue.</td>
</tr>
<tr>
<td></td>
<td>combined. Can be shown in graph or list view. This analysis is filtered to display</td>
<td></td>
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<tr>
<td></td>
<td>only those partners where the logged-in user is part of the account team.</td>
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<td></td>
</tr>
<tr>
<td>Partner’s Pipeline by Stage</td>
<td>Shows an analysis with the total amount of partner potential revenue in each pipeline</td>
<td>Uses key information such as Partner Name, Pipeline Amount, Open Pipeline, Won</td>
</tr>
<tr>
<td></td>
<td>stage, as well as closed revenue, and total of all revenue for all partners. Can be</td>
<td>Revenue, % of Total Amount, Total Revenue, and Opportunity Sales Stage.</td>
</tr>
<tr>
<td></td>
<td>shown in graph or list view. This analysis is filtered to display only those partners</td>
<td></td>
</tr>
<tr>
<td></td>
<td>where the logged-in user is part of the account team.</td>
<td></td>
</tr>
<tr>
<td>Stalled Opportunities Tile</td>
<td>This infolet shows opportunities expected to close in the current quarter that are</td>
<td>Uses key information for analysis display such as Win %, Name, Opportunity ID,</td>
</tr>
<tr>
<td></td>
<td>stuck in the pipeline. Stalled is defined as open for a time period longer than the</td>
<td>Account, Customer Row ID, Customer Type Code, Sales Stage, Pipeline Days, Close</td>
</tr>
<tr>
<td></td>
<td>average duration of the sales stage. This infolet also filters opportunities with</td>
<td>Date, Pipeline Amount.</td>
</tr>
<tr>
<td></td>
<td>partners owned by the logged-in Channel Account Manager.</td>
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<tr>
<td></td>
<td>This analysis is exposed on the Sales Infolets page.</td>
<td></td>
</tr>
<tr>
<td>Stalled Opportunities</td>
<td>Shows opportunities that are stuck in the pipeline, and sorted descending by days</td>
<td>Uses key information for analysis display such as Win %, Name, Opportunity ID,</td>
</tr>
<tr>
<td></td>
<td>stalled. Stalled is defined as open for a time period longer than the average</td>
<td>Account, Customer Row ID, Customer Type Code, Sales Stage, Pipeline Days, Close</td>
</tr>
<tr>
<td></td>
<td>duration of the sales stage. This analysis is filtered to display only those partners</td>
<td>Date, Pipeline Amount.</td>
</tr>
<tr>
<td></td>
<td>where the logged-in user is part of the account team.</td>
<td></td>
</tr>
<tr>
<td>Top Open Opportunities Tile</td>
<td>This infolet shows the top open opportunities (Win Probability &gt; 70%) in the pipeline</td>
<td>Uses key information for analysis display such as Open Opportunity Line Revenue,</td>
</tr>
<tr>
<td></td>
<td>by count and amount. This analysis is filtered to display opportunities with partners</td>
<td># of Open Opportunities, Customer Name,</td>
</tr>
<tr>
<td></td>
<td>owned by the logged-in Channel Account Manager.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>This analysis is exposed on the Sales Infolets page.</td>
<td></td>
</tr>
<tr>
<td>Top Opportunities</td>
<td>Shows top opportunities that partners are working on. This analysis is filtered to</td>
<td>Uses key information for analysis display such as Open Opportunity Line Revenue,</td>
</tr>
<tr>
<td></td>
<td>display only those partners where the logged-in user is part of the account team.</td>
<td># of Open Opportunities, Customer Name, Customer Row ID, Customer Type Code.</td>
</tr>
<tr>
<td>Won Opportunities Drill Down</td>
<td>Shows a single partner’s accounts and the total amount of closed or won opportunities</td>
<td>Uses key information such as Pipeline Amount, Customer Name, Close Time,</td>
</tr>
<tr>
<td></td>
<td>sorted from highest on top. This analysis is filtered to display only those partners</td>
<td>Opportunity Name, and Partner.</td>
</tr>
<tr>
<td></td>
<td>where the logged-in user is part of the account team.</td>
<td></td>
</tr>
</tbody>
</table>
Analyses For Executives

This table lists the analyses that are designed to help sales executives make key business decisions. They show forecast detail, opportunities for their teams, quota information, and performance detail.

Analysis Listing For Sales Executives

The following table contains analyses stored in BI under ..Sales/Embedded Content/ Sales Executive.

<table>
<thead>
<tr>
<th>Report Title</th>
<th>Report Description</th>
<th>Column Names</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual vs. Quota</td>
<td>Shows the quota assigned and how many opportunities won. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information such as Resource Quota, Won Revenue, and Attainment Percent.</td>
</tr>
<tr>
<td>Forecast vs. Open Pipeline for Sales Exec</td>
<td>Shows if the team has enough sales in the pipeline to meet forecasted targets. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Enterprise Quarter, Territory Owner ID, forecast, Territory Owner, Territory Name, Territory ID, Won Revenue, Open Pipeline.</td>
</tr>
<tr>
<td>Forecast vs. Quota</td>
<td>Shows how the team is trending toward meeting their quota. This analysis is filtered to display only those partners where the logged in user is part of the account name.</td>
<td>Uses key information for analysis display such as Total Forecast, Target Quota, Remaining Quota, Forecast vs. Quota, Axis Limit.</td>
</tr>
<tr>
<td>My Team’s Leads for Sales Exec</td>
<td>Shows many leads does the team currently has. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such Deal Size, # of Leads, Age, Name, Rank, Customer Row ID, Employee, Lead Status, Time frame, Lead Channel, Lead ID, Account.</td>
</tr>
<tr>
<td>My Team top Open Opportunities for Sales Exec</td>
<td>Shows top open opportunities of a sales team. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Open Opportunity Line Revenue, # of Open Opportunities, Customer Name, Customer Row ID, Customer Type Code.</td>
</tr>
<tr>
<td>My Team’s Tasks on Open Opportunities</td>
<td>Shows top opportunities currently in the pipeline. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Tasks on Open Opportunity, Completed Tasks on Open Opportunities, % Completion, Enterprise Quarter, Employee First Name, Employee Last Name, Employee Row ID, Opportunity Status Category.</td>
</tr>
<tr>
<td>Sales Stage by Age</td>
<td>Shows where deals are in the pipeline by how long they have been in the pipeline. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Sales Stage Name, # of Days in Stage, # of Opportunities, Total Opportunities, Enterprise Quarter, Sales Stage Row ID.</td>
</tr>
<tr>
<td>Report Title</td>
<td>Report Description</td>
<td>Column Names</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Sales Performance Trend</td>
<td>Shows how sales are trending for that quarter in terms of opportunities won and lost. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Shows how sales are trending for that quarter in terms of opportunities won and lost. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
</tr>
<tr>
<td>Team Leadership Board</td>
<td>Shows the leaders of a sales team. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Employee name, Employee Row ID, Won Revenue, Closed Opportunity Line Revenue, Target Quota, Quota Attainment.</td>
</tr>
<tr>
<td>Top Open Opportunities</td>
<td>Shows top open opportunities of a sales team. This analysis is filtered to display only those partners where the logged in user is part of the account team.</td>
<td>Uses key information for analysis display such as Open Opportunity Line Revenue, # of Open Opportunities, Customer Name, Customer Row ID, Customer Type Code.</td>
</tr>
<tr>
<td>Actual vs. Quota for Sales Exec Tile</td>
<td>Shows the quota assigned and how many opportunities won. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Resource Quota, Won Revenue, Gap, Attainment Percent.</td>
</tr>
<tr>
<td>My Team Forecast vs. Open Pipeline for Sales Exec Tile</td>
<td>Shows if the team has enough sales in the pipeline to meet forecasted targets. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Revenue Forecast Facts, Forecast.</td>
</tr>
<tr>
<td>My Team Leads for Sales Exec Tile</td>
<td>Shows how many leads the team currently has in the pipeline. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Lead Facts, # of Leads, # of leads converted.</td>
</tr>
<tr>
<td>My Team Performance for Sales Exec Tile</td>
<td>Shows team performance by won revenue. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Employee Name, Rank, Won Revenue, Resource Quota.</td>
</tr>
<tr>
<td>My Team Pipeline for Sales Exec Tile</td>
<td>Shows opportunities that are stuck in the pipeline and are not moving forward. Shows if there is enough open opportunity to meet forecasted targets. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Pipeline Detail Facts, Open Revenue, and Deal Count.</td>
</tr>
<tr>
<td>My Team top Open Opportunities for Sales Exec Tile</td>
<td>Shows top opportunities currently in the pipeline. This analysis is filtered to display only those partners where the logged in user is part of the account team. This analysis is used for infolet dashboard display.</td>
<td>Uses key information such as Pipeline Detail Facts, Open Revenue, and Deal Count.</td>
</tr>
<tr>
<td>Report Title</td>
<td>Report Description</td>
<td>Column Names</td>
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</tr>
<tr>
<td></td>
<td>is part of the account team. This analysis is used for infolet dashboard display.</td>
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</tr>
</tbody>
</table>
Using Industry Solutions: Overview

Read this chapter to understand the various prebuilt, industry-specific solutions available for use in Oracle Sales Cloud. These industry solutions cater to the distinct needs of the related industry, and leverage the comprehensive Oracle product portfolio to support its related functions.

Here’s what you can do using industry solutions:

- Track and manage billing-specific revenue and contracts using the Communications application.
- Plan and manage retail execution and trade promotion activities using Consumer Goods application.
- Analyze customer information to determine the most appropriate products to sell to customers using the Financial Services application.
- Plan, manage, and track your student recruitment activities to get prospective students apply for an admission to your institution using the Higher Education application.
- Streamline your partner relationship and sales processes using the High Tech and Manufacturing application.

The topics in this chapter provide an overview of the various industry solutions available in with Oracle Sales Cloud.

For more information about these industry solutions, see the related guides on Oracle Help Center.

Related Topics
- Guides on Oracle Help Center

Consumer Goods: Overview

This topic provides an overview of retail execution and trade promotion in Consumer Goods industry.

Use the retail execution activities in Consumer Goods to plan and perform your retail visits for the day. Check in to retail stores to view the history of orders, perform audits, replenish stock, evaluate stock location, analyze the efficiency of store visits, and so on. Use the trade promotions activities in Consumer Goods to manage offers and discounts in retail stores, use promotion program templates to design promotions, create and manage trade funds to finance promotions, measure the effectiveness of promotions, and so on.

Retail Execution

Retail execution tasks can be categorized as under:

- Preparing for retail visits: Plan and schedule activities that you want to perform during retail visits. While preparing for a retail visit, you review and schedule appointments, review promotions, review open tasks and verify customer information including location.
- Performing retail activities during visits: Perform retail activities like checking in to appointments and performing inventory audit, reviewing promotions with the store manager and adding them to the shopping cart, creating and reviewing orders and conducting surveys and assessments.
• Closing retail visits: Complete your visit to a retail store and performing activities like making a note of pending activities, rescheduling pending activities, creating appointments for follow-up visits and checking out.

Trade Promotion
Let’s understand trade promotions using a scenario. This scenario is an example of a process performed by brand managers and account managers.

Your company may follow a different process according to its business requirements. A beverage manufacturer has developed a new brand of fruit-flavored beverage. The marketing manager creates a promotion group to launch and promote the new brand. Account managers for a large chain of grocery stores are responsible for creating promotions to generate incremental volume and brand awareness. They follow this up with a review of the promotion program. The account manager then modifies the promoted products to include in the promotion and publishes it. The promotion is now available to the field sales representative as part of the retail outlet visit.

Financial Services: Overview
Oracle Sales Cloud for Financial Services provides complete financial services that utilize the integration of Oracle Sales Cloud and Oracle Engagement Cloud with Oracle Marketing Cloud.

Both retail bankers and commercial bankers can use this application to modernize their branches and automate the process of identifying, nurturing, and creating referrals to cross-sell products across any channel including social, mobile, and Web. Retail banking is B2C banking. Commercial banking is B2B banking.

The Financial Services industry solution provides a quick and complete view of customer information and interactions, which the banks can use to build a personalized relationship with each customer and offer financial products and services that best suit a customer’s unique needs.

Business Scenario
The business flow in the financial services scenario can be summarized as follows:

• Oracle Marketing Cloud offers social campaigns and analyzes customer activities to generate leads. These leads are assigned to bankers. These leads enable bankers to engage with potential buyers or prospects and based on the insight that Oracle Sales Cloud provides, which includes financial profile and financial accounts, convert a lead to opportunity.
• Needs Analysis in Oracle Sales Cloud enables bankers to find the best suited financial product for customer based on customer needs and bank policies. Needs Analysis updates an opportunity and supports account origination process.
• Customer 360 provides a complete view of customer financial information, including financial profile, financial accounts summary and detail, and financial accounts analytics. Financial accounts analytics include financial accounts snapshot and monthly average balance reports.
• Service request and knowledge management to enrich customer experience.

You can stay up-to-date on the status through dashboard and analytics that provide a snapshot of key performance indicators during the financial services cycle.

You can utilize the functionality of Oracle Marketing Cloud, Oracle Sales Cloud, and Oracle Engagement Cloud to work with the standard functionality and concepts such as Appointment, Account, Contact, Household, Lead, Opportunity, Service
Request and so on to understand and engage with your customer, and to do what you want to do: sell more and retain customers.

### High Tech and Manufacturing: Overview

Oracle Sales Cloud for High Tech and Manufacturing provides end-to-end solutions to automate identifying, nurturing, and tracking partners and channel organizations to align their businesses and close deals successfully.

Partner Relationship Management is used to analyze your partners, optimize resources and financial investments.

Channel account managers can sign up new partners, provide partners with portal access, manage partner teams, and manage partner program enrollments. Channel account managers can also use Oracle Social Network to engage partners in conversations related to key accounts, contacts, opportunities, and activities.

The partner portal offers lead-to-quote management, business planning, and social collaboration. Partner salespeople can use the partner portal to qualify leads and register opportunities with their channel organization.
The following figure illustrates channel sales execution:

High tech and manufacturing business summaries can be summarized as follows:

- **Channel sales execution:**
  - Channel account managers can assign leads to partners.
  - Partners can qualify leads and register the leads as deals.
  - Channel account managers can review registered deals and decide whether deals have the potential to be converted to opportunities.

- **Sales execution:**
  - Sales teams can use account plans to start and manage the account planning process for customer accounts.
  - Sales teams can create and use opportunities to anticipate and monitor prospect requirements.
  - Sales teams can use various or different sales methods to track the progress of opportunities at each sales stage.
Communications: Overview

Use Communications industry solution to renew contracts, track revenue, view reports, key performance indicators, and manage profiles and opportunities.

Communications solution provides:

- Customized layouts of opportunity and account as per the contract renewal process of business to business (B2B) communications customers.
- Preconfigured integrations with Siebel CRM and E-Billing version 7.0. This integration supports sales activities for contract renewals, which include:
  - Automatic creation of contract renewal opportunities for expiring agreements in Siebel CRM.
  - Automatic creation of quotes.
  - A 360 degree view of customers of current contracts, historical sales and service activities, detailed usage and billing data.
- Dashboards for sales management that display key sales performance indicators and analytics on contract renewals, stalled deals, bundled products, and so on.

Higher Education: Overview

The higher education application enables you to plan, manage, and track your student recruitment activities.

As a student recruiter or admissions coordinator for your institution, you can use the following key capabilities:

- Capture information about student inquiries and prioritize outreach efforts.
- Manage inquiries and constituent data.
- Plan outreach activities with organizations, inquiries, or contacts from the organizations.
- Use the social networking functionality to collaborate on outreach activities.

Terms and Definitions

Oracle Sales Cloud for Higher Education uses terms that are referred to differently in Oracle Sales Cloud. The following table describes the difference in terminology.

<table>
<thead>
<tr>
<th>Term in Oracle Sales Cloud for Higher Education</th>
<th>Term in Oracle Sales Cloud</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Constituents</td>
<td>Contacts</td>
<td>Constituents in higher education are prospective students; contacts from an organization, such as teachers, administrators, coaches or human resource representatives; and people related to prospective students, such as parents, relatives, or friends.</td>
</tr>
<tr>
<td>Term in Oracle Sales Cloud for Higher Education</td>
<td>Term in Oracle Sales Cloud</td>
<td>Definition</td>
</tr>
<tr>
<td>------------------------------------------------</td>
<td>---------------------------</td>
<td>------------</td>
</tr>
<tr>
<td>Inquiries</td>
<td>Leads</td>
<td>Inquiries for prospective students refer to information related to a student’s academic interests, entry year, and academic level.</td>
</tr>
<tr>
<td>Organizations</td>
<td>Accounts</td>
<td>Organizations are high schools, community colleges, or other colleges or universities for students. Organizations can also be the place of employment for students who pursue part-time studies alongside their paid employment.</td>
</tr>
<tr>
<td>Programs of Interest</td>
<td>Product Groups</td>
<td>Programs of interest refer to the programs that a prospective student might be interested in, such as art, biology, history, chemistry, and so on.</td>
</tr>
</tbody>
</table>
Sample Process Flow

The following figure illustrates a sample process flow for student recruitment.

1. **Administrator**
   - Import or manually enter organization data
   - Use data of prospective students from various sources

2. **Admissions Coordinator**
   - Add organization contacts as constituents and associate them to organization
   - Assign organization to the recruiter

3. **Student Recruiter**
   - Plan outreach activities with organization constituents
   - Organization outreach results in prospective students
   - Create constituent and inquiry for the student, qualify the inquiry
   - Engage with the inquiry through meetings, calls, and e-mails
   - Inquiry applies to the institution

Organization outreach results in prospective students.
The administrator receives prospective student data and adds them to the application. The prospective student data is then assigned to the recruiting staff, such as admissions coordinators or student recruiters, who execute the student recruitment activities in the following way:

- Institutions are added as organizations and contacts for the specific organization are added as organization constituents.
- The student recruiter plans outreach activities at the institution to meet prospective students.
- Inquiries are created for the prospective students and are further qualified depending on various parameters.
- The student recruiter follows up through meetings, calls, and e-mails and successfully gets the student to apply for admission to her institution.
Using 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 key features of Oracle Sales Cloud for Outlook are:

<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 e-mails, 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 e-mail, or when setting up a task, a single click on the Share with Fusion 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>Customize 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 customizable objects, fields, and UI layout options. For example, custom 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. The user must not have the Sales Administrator job role assigned.

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 how to install the Oracle Sales Cloud for Outlook application on a laptop or PC.

Download the Oracle Sales Cloud for Outlook installer file, run the InstallShield Wizard, and enter the Oracle Sales Cloud server connection information, if required.

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 salesperson, 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. Select the appropriate installer language, and then click Start Download to download the installer.

Running the InstallShield Wizard

To run the InstallShield wizard:

1. Navigate to the installation file, and double-click the file to start the installation.
2. On the Welcome page of the InstallShield Wizard, click Next.
3. On the Customer Information page, check the User Name and Organization Name default values, and change them if necessary.
4. Click Next.
5. 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.
6. When you have confirmed or selected a folder on the Destination Folder page, click Next.
7. 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.

For more details on installing and administering Oracle Sales Cloud for Outlook, see the Oracle Sales Cloud for Outlook - R9 Deployment Guide (Doc ID 1983748.1) on My Oracle Support.

## Why can't I view complete customer details for some customers associated with a contact, even though the customers are part of my sales territory?

When synchronizing contacts with multiple customer relationships, you only have full access to the details of customers who are included in the results of the criteria that is specified in your synchronization filter.

For example, you have a contact in Oracle Sales Cloud that is associated to two customers, Customer A and Customer B. Because the customers are part of your sales territory, you have full access to both of the customer records in Oracle Sales Cloud. However, in your Oracle Sales Cloud for Outlook client, you have a synchronization filter criteria that only returns Customer A. The result is that when you synchronize the Oracle Sales Cloud for Outlook client using this synchronization filter criteria, all of the customer data for Customer A is synchronized, but only a restricted amount of customer data is synchronized for customer B.

## How can I stop appointments, contacts, and tasks from being shared automatically with Outlook?

Right-click on the Oracle Sales Cloud for Outlook system tray icon and then select **Options**. Within the Options window, click **Advanced**, and then deselect **Always share with Oracle Sales Cloud new: Appointments, Contacts, Tasks**.
Overview of Oracle Sales Cloud for IBM Notes

The Oracle Sales Cloud for IBM Notes application helps maximize sales productivity by providing Oracle Sales Cloud capabilities directly within IBM Notes, thereby allowing sales professionals access to essential Sales Cloud data.

Summary of Features

The key features of Oracle Sales Cloud for IBM Notes are:

- **Sales Cloud capabilities within IBM Notes**: Using Oracle Sales Cloud for IBM Notes, all e-mails, calendar events, and tasks can be linked to the respective contact, customer, lead, or opportunity within Oracle Sales Cloud. Sales professionals can access customer and sales information within IBM Notes.

- **Single-click sharing between IBM Notes and Oracle Sales Cloud**: When sending a meeting invite or an e-mail, or when setting up a task, a single click captures the action and updates of Oracle Sales Cloud in the background.

- **Synchronization of data between Oracle Sales Cloud and IBM Notes**: Two-way data synchronization allows sales professionals to have a continuously updated and accurate 360-degree view of Sales Cloud data changes.

- **Synchronization Control Panel**: Oracle Sales Cloud for IBM Notes provides synchronization filtering capabilities, enabling sales professionals to synchronize only the most critical data from Oracle Sales Cloud.

- **Offline access**: 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.

**Note**: You cannot customize Oracle Sales Cloud for IBM Notes as customization is not supported.
19 Using Gmail

Overview of Oracle Sales Cloud for Gmail

Oracle Sales Cloud for Gmail helps increase sales productivity by providing Oracle Sales Cloud capabilities within Gmail. Sales professionals can easily access the Sales Cloud data such as contacts, appointments and e-mails from their Gmail account.

Summary of Features

The key features of Oracle Sales Cloud for Gmail are:

- Synchronize contacts and appointments from Oracle Sales Cloud to Gmail and have a consolidated view in Gmail.
- Selectively choose which e-mails, contacts and appointments in Gmail are tracked in Oracle Sales Cloud.
- Link Sales Cloud Accounts, Contacts, Leads, Opportunities and Resources with e-mails, contacts and appointments in Gmail.
- Administrative filters to determine what contacts and appointments synchronize to Gmail to limit the Sales Cloud data in users’ Gmail accounts.

Installing and Configuring Oracle Sales Cloud for Gmail: Explained

You can integrate Oracle Sales Cloud with your Gmail account and access your Oracle Sales Cloud contacts, appointments, and e-mails from your Gmail account. This topic explains how to install and sign in to the Oracle Sales Cloud for Gmail extension, how to upgrade to new versions, and how to uninstall.

To install Oracle Sales Cloud for Gmail, contact Oracle Support.

After the installation is complete, Oracle Sales Cloud for Gmail extension appears as a side panel on your Gmail when you open an appointment or an e-mail.

† 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.

To uninstall the Oracle Sales Cloud for Gmail extension:

1. Navigate to Chrome Settings.
2. Click Extensions.
3. Find the Oracle Sales Cloud for Gmail extension and click the Remove from Chrome icon.
Signing in to Oracle Sales Cloud for Gmail

Once you sign in to Gmail, you must open an appointment or an e-mail for the Oracle Sales Cloud for Gmail side panel to appear.

To configure and sign in to Oracle Sales Cloud for Gmail:

1. Click the **Settings** icon on the side panel.
2. On the Sales Cloud Connection page, enter the host name.
   
   To obtain the host name, sign in to simplified UI, navigate to Accounts, and copy the first part of the URL, as indicated in the following image:

   ![Host Name Image]

3. Sign in using the salesperson user name and password that you use to sign in to Oracle Sales Cloud.

Upgrading to New Versions

Oracle Sales Cloud for Gmail detects when a new version of the extension is available and automatically upgrades you to the latest version. If your Chrome browser is open, the upgrade happens only when you restart the browser.

Creating Contacts From the Oracle Sales Cloud for Gmail Side Panel: Procedure

You can maintain a consolidated list of your contacts within Gmail to work more effectively. You can add contacts to Oracle Sales Cloud from your Gmail account.

Oracle Sales Cloud for Gmail identifies which of your contacts from an e-mail or appointment exist in Oracle Sales Cloud and highlights those that have to be added. The Gmail extension also highlights Google contacts that do not exist on Oracle Sales Cloud when you open a specific contact.

Adding Contacts to Oracle Sales Cloud

You must have an e-mail, an appointment or the new or existing contact on Google Contacts open to add a contact to Oracle Sales Cloud.
If your contact already exists in Oracle Sales Cloud, the side panel displays the initials of the contact. For example, in the following image, SB refers to a contact that already exists in Oracle Sales Cloud. For contacts that do not exist in Oracle Sales Cloud, the side panel displays the person icon.

To add a contact to Oracle Sales Cloud from Gmail:

1. Click the person icon for the contact on the side panel of Oracle Sales Cloud for Gmail.
   
   A message appears on the top of the Oracle Sales Cloud for Gmail panel notifying that the contact does not match an existing contact in Oracle Sales Cloud.
2. Click the link on the message to add your contact.
   
   The Create page appears.
3. Enter the fields to create your contact:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Enter the name of the contact.</td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
</tr>
<tr>
<td>Job Title</td>
<td>Optionally, enter the job title of the contact.</td>
</tr>
<tr>
<td>Account</td>
<td>Optionally, search for and select the account that the contact belongs to.</td>
</tr>
<tr>
<td>E-mail</td>
<td>The e-mail is automatically populated with the e-mail ID that the opened e-mail displays. You cannot edit the e-mail ID.</td>
</tr>
<tr>
<td>Address</td>
<td>Enter the complete address of the contact.</td>
</tr>
</tbody>
</table>

   You must enter the state and country codes in the **State** and **Country** fields respectively.

| Favorite  | To save this contact as a favorite, highlight the star. |

4. Click **Save**.

Your contact is now added to Oracle Sales Cloud. Close the e-mail and open it again. The contact you just added now appears as initials in the side panel indicating that the contact is now added to Oracle Sales Cloud.

**Creating Contacts Using Oracle Sales Cloud for Gmail: Examples**

You can create contacts on Oracle Sales Cloud using Oracle Sales Cloud for Gmail in several ways. The following examples illustrate these options.
Creating Contacts from E-Mail

You just received an e-mail on Gmail from your customer Devon Smith from Seven Corporation. You open the e-mail and the Oracle Sales Cloud for Gmail side panel appears. The side panel shows that your contact Devon Smith is not added as a contact on Oracle Sales Cloud.

You would like to add Devon Smith to Oracle Sales Cloud. You click the person icon and create your contact.

Creating Contacts from Appointments

You want to set up a meeting with Anne Balmer, a new contact that you are interacting with from Seven Corporation. You navigate to Google Calendar and create a new appointment. When you add Anne Balmer as a guest to the appointment, the Oracle Sales Cloud for Gmail side panel appears with the person icon to indicate that your contact is not added on Oracle Sales Cloud. You click the person icon and create your contact on Oracle Sales Cloud.

Creating Contacts from Google Contacts

You are viewing your list of contacts on Google contacts to verify if you have already added your customer Fen Lee as a contact on Google. You do not see the contact, and you want to create the contact and also add it to Oracle Sales Cloud. You click New Contact on Google Contacts and enter the name of the contact, Fen Lee. The Oracle Sales Cloud for Gmail side panel appears and shows that your contact is not added as a contact on Oracle Sales Cloud.

You click the person icon and create the contact Fen Lee on Oracle Sales Cloud.

Note: If you add a note to the contact on Google Contacts, the note is not synchronized with Oracle Sales Cloud.

Sharing Your E-Mail with Oracle Sales Cloud Users: Example

You can share e-mail that you receive or send from your Gmail account with Oracle Sales Cloud. You can share e-mail related to a specific account, opportunity, or lead with your team on Oracle Sales Cloud thereby providing them with any relevant information or history related to the customer. Sharing e-mail not only associates your e-mail as an activity with the relevant account, opportunity or lead, but also adds related known contacts or resources to the Activity on Oracle Sales Cloud.

This topic provides an example that illustrates how to share an e-mail as an activity of type task under opportunities on Oracle Sales Cloud.
Sharing E-Mail With Oracle Sales Cloud

You are a sales representative handling the North America region for laptop sales. You are in conversation with a customer on their requirement for your new range of laptops. You have just received an e-mail reply from the customer with some questions on pricing. You would like to associate this e-mail with an existing opportunity on Oracle Sales Cloud so that you can share it with your manager and other salespeople on your team.

You click the E-mail icon on the side panel of Oracle Sales Cloud for Gmail.

On the Share E-Mail page, you search for and select the relevant opportunity and click Save. You have now saved your e-mail on Oracle Sales Cloud as an activity task for the selected opportunity, making it available for your team to review. When salespeople open the opportunity, they can now view this e-mail as an activity associated with the opportunity.

Note: If the e-mail that you are sharing contains attachments, all attachments that are 10 MB or less are associated with the corresponding task in Oracle Sales Cloud.

Oracle Sales Cloud and Gmail Synchronization Settings: Explained

You can synchronize your contacts and appointments between Oracle Sales Cloud and Gmail. This topic explains how you can set up the synchronization on your Oracle Sales Cloud for Gmail.

Synchronization of contacts and appointments between Gmail and Oracle Sales Cloud is triggered automatically according to the defined synchronization frequency. All Google contacts and appointments are not automatically saved in Oracle Sales Cloud. You must choose contacts and appointments that you want saved in Oracle Sales Cloud in the Oracle Sales Cloud for Gmail side panel.

Synchronization Settings

You can use two settings to select saved searches and determine what you want to synchronize between Oracle Sales Cloud and Gmail:

- Contact Synchronization
- Activity Synchronization

You can select the setting you want from the drop-down list of the Oracle Sales Cloud for Gmail side panel. You can select a saved search option to set up synchronization between Oracle Sales Cloud and Gmail.

Note: After contacts and appointments are synchronized between Oracle Sales Cloud and Gmail, any updates to the contacts and activities either on Oracle Sales Cloud or on Gmail are synchronized during the next synchronization depending on the frequency that your administrator has defined.
Saved Search

You can use the predefined saved searches that are available in the drop-down list on Oracle Sales Cloud for Gmail or create your own saved search on Oracle Sales Cloud. By default, the saved search for contact is set to **My Favorite Contacts** and for appointment it is set to **All Open Activities**.

The following table lists the predefined saved search options for contact and activity. Apart from these predefined saved searches, if you want to define your saved search, you can create it on Oracle Sales Cloud. See the topic Managing Saved Search Lists: Procedure to create your own saved search.

<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, of the type sales account, that you are an owner of.</td>
</tr>
<tr>
<td>My Favorite Contacts</td>
<td>All your favorite contacts.</td>
</tr>
<tr>
<td>My Open Activities</td>
<td>All appointments that are open and you are a resource for in Oracle Sales Cloud.</td>
</tr>
</tbody>
</table>

When you select a saved search, the corresponding records matching the saved search are synchronized with Gmail when the next synchronization runs. If you then select another saved search, a new set of records are synchronized with Gmail. However, the old set of records synchronized with Gmail earlier continue to remain on Gmail. You must manually delete these records on Gmail. If you update a record from the old set of records on Gmail, your changes will be synchronized with Oracle Sales Cloud. However, if you update a record from the old set of records in Oracle Sales cloud, your changes are not synchronized with Gmail.

**Related Topics**

- Scheduling Oracle Sales Cloud and Gmail Synchronization Job: Procedure
- Managing Contact Saved Search Lists: Explained

Oracle Sales Cloud and Gmail Synchronization: Explained

You can synchronize your contacts and appointments between Oracle Sales Cloud and Gmail. This topic explains how synchronization works when you create, update, or delete records in Oracle Sales Cloud or in Gmail.

New Records

Contacts and appointments that you create in Oracle Sales Cloud are added to Gmail during synchronization, based on the saved search criteria that you have defined. However, contacts and appointments that you create in Gmail are not synchronized with Oracle Sales Cloud. You can synchronize contacts and appointments with Oracle Sales Cloud only through the Oracle Sales Cloud for Gmail side panel.
Note: If you mark a new contact as favorite in Oracle Sales Cloud, the contact does not appear as favorite in Gmail.

Updated Records
Contacts and appointments that are already shared with Oracle Sales Cloud can be updated directly in Gmail or in the side panel.

- Updates in the side panel: If you update your record in the side panel, the record is updated in Oracle Sales Cloud as soon as you save your record.
- Updates in Gmail: If you update the record in Gmail, the record in Oracle Sales Cloud is updated during the next synchronization. Any updates to records in Oracle Sales Cloud are updated in Gmail during the next synchronization.

Deleted Records
You can delete records only in Oracle Sales Cloud. If you delete a shared contact or appointment in Gmail, the record is shared with Gmail again from Oracle Sales Cloud during the next synchronization.

Simultaneous Updates to Records
If contacts or appointments are updated simultaneously in Oracle Sales Cloud and Gmail, the updates in Oracle Sales Cloud are retained and synchronized with Gmail. Between synchronization cycles, even if a record is updated first in Oracle Sales Cloud and then in Gmail, the updates made in Oracle Sales Cloud are retained and synchronized with Gmail.

For example, your synchronization duration is set to run once every hour starting at 12.00 a.m. During the synchronization cycle between 2.00 p.m. and 3.00 p.m., a salesperson updates the mobile number of a contact in Oracle Sales Cloud at 2.10 p.m. You update the mobile number of the same contact on Gmail at 2.45 p.m. When synchronization runs at 3.00 p.m., your changes on the contact will be lost and the mobile number update on Oracle Sales Cloud will be brought down to Gmail although you made your change later in the synchronization cycle.

Related Topics
- Scheduling Oracle Sales Cloud and Gmail Synchronization Job: Procedure
20 Using Mobile Applications

Using Mobile Applications: Overview

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, provides installation information, and answers general use questions.

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.
- Review quota attainment, open pipeline, and sales commission reports.
- View sales information while offline.
- View service requests that you have access to.

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

What are the supported platforms for Oracle CX Cloud Mobile?
See the System Requirements for Oracle Applications Cloud at: http://www.oracle.com/us/products/system-requirements/overview/index.html

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'll 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.

Setting Up Calendar and Contact Synchronization on your iPhone: Worked Example
This example shows you how to set up the synchronization of Oracle Sales Cloud calendar and contacts with the native calendar and contacts on your iPhone.

> **Note:** You can synchronize your Oracle Sales Cloud favorite contacts using the contact synchronization. However, the calendar synchronization does not synchronize invitees.

Install the Calendar Synchronization Profile

1. Sign in to Oracle CX Cloud Mobile (CX Cloud Mobile) using your user name and password.
2. Tap the menu icon to access the shuttle menu.
3. Tap **Settings** and tap **Setup Calendar Sync**.
Chapter 20
Using Mobile Applications

4. The Safari browser opens automatically with the Oracle Sales Cloud sign in page displayed. Sign in using your CX Cloud Mobile user name and password and install the synchronization profile onto your phone. Installing the profile adds a new calendar to your iPhone that you can view along side your other calendars.
5. Enter the password for the CalDav server. This is the same password that you use to sign in to Oracle Sales Cloud.
6. Tap Next.
7. Once you’ve finished tap Done.

Install the Contacts Synchronization Profile

1. Sign into CX Cloud Mobile using your user name and password.
2. Tap the menu icon to access the shuttle menu.
3. Tap Settings and tap Setup Contact Sync.
4. Repeat steps 5 to 7 above.

General Use

How can I navigate within Oracle CX Cloud Mobile?
On both the iPhone and Android mobile devices, tap the menu icon to show the list of features. Then tap the feature to retrieve a list of items; for example, tap Opportunities to retrieve a list of your open opportunities. In the list view, swipe to the left on an item to access frequent tasks. To view the item details, tap any item in the list view. In the details page, view the tabs to access related information.

To e-mail, call, text, or locate a contact quickly, tap their initials to display a contact wheel, and then tap the relevant icon. Your smartphone’s native e-mail, phone, or text application opens, or - if you have tapped the pin icon - a map opens within Oracle CX Cloud Mobile.

Tap the more icon anywhere within the application to view actions for an item, such as logging a call, creating a task, or sending an e-mail that you’re running late.

How can I remove a contact from an opportunity, account, or lead?
From the opportunity, account, or lead detail page, tap the Contacts tab and swipe to the left on the contact you want to remove. Tap the more icon and tap Remove.

How can I add an objective when I am creating a call report?
There are two different kinds of objectives that you can add when creating a call report: A predefined objective and a user-defined objective.

To create a predefined objective:

1. Tap the plus icon in the Objectives section
2. Select the predefined objective
3. Tap Add

To create a user-defined objective:

1. Tap the plus icon in the Objectives section
2. Type the name of the objective at the top of the page
3. Tap Add

Why did I receive a message that there are more records to display on the map?
You can view the first 25 records prioritized by your current location when you first access the map. If there are more records, you will see a message saying there are more records in the vicinity. Tap the message and you will see the next 25 records.
(as well as the ones you can already view). If there are more records to display, then tap the message again and you will see another 25 records on top of the records you can already view (totaling the first 75 records in your vicinity).

**How can I change my primary contact in an opportunity, account, or lead?**

Tap the edit icon on the opportunity, account, or lead, and tap the cross icon that appears next to the primary contact name. Select a new primary contact from the contact list and tap **Save**.

Tap the Contacts tab within the opportunity, account, or lead details page and swipe to the right on the contact you want to make the primary contact. Tap the green tick icon.

**Voice Commands: Explained**

You can use the following voice commands in Oracle CX Cloud Mobile to navigate around the application.

> **Note:** Voice commands are available in English only at this time.

<table>
<thead>
<tr>
<th>To do this</th>
<th>Say this</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open a page</td>
<td>Open &lt;page name&gt;</td>
<td><em>Open Calendar</em></td>
</tr>
<tr>
<td></td>
<td>Take me to &lt;page name&gt;</td>
<td><em>Take me to Deal Registrations</em></td>
</tr>
<tr>
<td></td>
<td>Pull up &lt;page name&gt;</td>
<td><em>Pull up Opportunities</em></td>
</tr>
<tr>
<td></td>
<td>Go to &lt;page name&gt;</td>
<td><em>Go to Tasks</em></td>
</tr>
<tr>
<td></td>
<td>Show &lt;page name&gt;</td>
<td><em>Show Contacts</em></td>
</tr>
<tr>
<td>Open a list</td>
<td>Open/open my &lt;list name&gt;</td>
<td><em>Open my Account list</em></td>
</tr>
<tr>
<td></td>
<td>Take me to my/take me to the &lt;list name&gt;</td>
<td><em>Take me to the Contact list</em></td>
</tr>
<tr>
<td></td>
<td>Pull up/pull up my/pull up the &lt;list name&gt;</td>
<td><em>Pull up Lead list</em></td>
</tr>
<tr>
<td></td>
<td>Go to/go to my/go to the &lt;list name&gt;</td>
<td><em>Go to my Opportunity list</em></td>
</tr>
<tr>
<td></td>
<td>Show/show my/show the &lt;list name&gt;</td>
<td><em>Show the Deal Registration list</em></td>
</tr>
<tr>
<td>Open a record</td>
<td>Open &lt;record type&gt; &lt;record name&gt;</td>
<td><em>Open Deal Registration 'Elite Server'</em></td>
</tr>
<tr>
<td></td>
<td>Take me to &lt;record type&gt; &lt;record name&gt;</td>
<td><em>Take me to Call Report 'Key Account Call'</em></td>
</tr>
<tr>
<td></td>
<td>Pull up &lt;record type&gt; &lt;record name&gt;</td>
<td><em>Pull up task 'Executive Demo Prep'</em></td>
</tr>
<tr>
<td></td>
<td>Go to &lt;record type&gt; &lt;record name&gt;</td>
<td><em>Go to Accounts 'Pinnacle Technologies'</em></td>
</tr>
<tr>
<td>Search for a record</td>
<td>Search for &lt;record type&gt; &lt;record name&gt;</td>
<td><em>Search for task 'Email Quote'</em></td>
</tr>
<tr>
<td></td>
<td>Find &lt;record type&gt; &lt;record name&gt;</td>
<td>Find contact 'Cole Mitchell'*</td>
</tr>
<tr>
<td></td>
<td>Look for &lt;record type&gt; &lt;record name&gt;</td>
<td>Look for opportunity 'Data Center Upgrade'*</td>
</tr>
<tr>
<td>Open an embedded application</td>
<td>Search for &lt;application name&gt;</td>
<td><em>Search for 'Incentive Compensation'</em></td>
</tr>
<tr>
<td></td>
<td>Go to &lt;application name&gt; application</td>
<td><em>Go to 'Social' application</em></td>
</tr>
</tbody>
</table>
To do this | Say this | Example
---|---|---
Open the settings page | Open/Take me to/Pull up/Go to the Settings page | "Take me to the Settings page"
Open the home page | Open/Take me to/Pull up/Go to the home page | "Pull up the home page"

There are specific voice commands that you can use to open your task list and calendar, and to turn off the voice feature.

<table>
<thead>
<tr>
<th>Specific Voice Commands</th>
<th>Say this</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open the task list</td>
<td>&quot;What's on my task list?&quot;</td>
</tr>
<tr>
<td></td>
<td>&quot;What should I do next?&quot;</td>
</tr>
<tr>
<td>Open the calendar</td>
<td>&quot;What's on my calendar?&quot;</td>
</tr>
<tr>
<td></td>
<td>&quot;What's next on my calendar?&quot;</td>
</tr>
<tr>
<td></td>
<td>&quot;What's coming up next?&quot;</td>
</tr>
<tr>
<td>Turn off voice commands</td>
<td>&quot;Close voice&quot;</td>
</tr>
<tr>
<td></td>
<td>&quot;Cancel&quot;</td>
</tr>
</tbody>
</table>

**Working Off-Line**

**Why can't I view updates to my data?**
When the application is in the offline mode, you cannot view any updates that were made to the sales data since the application changed to the offline mode, due to the absence of a network connection. You can view data updates when you access the record again after regaining access to a network connection.

**Can I create new records offline?**
Yes, you can create, edit, and delete records throughout the application in the offline mode and then sync them once the network connection is restored. You will see a banner telling you that you are in the offline mode when the application detects the network connection is lost.

**Data Availability and Capacity in the Offline Mode: Explained**
Oracle CX Enterprise Mobile (Enterprise Mobile) enables you to access your sales data offline and store up to 500MB of the data you have viewed recently.
Here are some more details about the data that are available in the offline mode and how to specify how much data you want to store on your phone when you are in the offline mode.

**Data Availability**
All of the sales objects that your administrator has enabled for Enterprise Mobile, for example opportunities and contacts, are available in the offline mode. The data can also be synchronized when the application detects a network connection.
changes to the online mode. Reports and analytics, however, are not available in the offline mode, as they require access to up-to-date data.

**Data Capacity**
Enterprise Mobile can save up to 500MB of recently viewed data on the mobile device when you are in the offline mode. After 500 MB (or whatever limit you have set) is reached, the application removes the oldest entries to make room for more recent data. To change the amount of data that are stored when you are offline, open the shuttle menu, tap **Settings**, and select the storage limit in **Offline Storage Limit**.

**How can I synchronize my offline data?**
Depending on the settings your administrator has specified, your data either synchronizes automatically when the device detects a network connection and goes online, or you can synchronize your data manually.

**What happens if there is an issue with the data synchronization?**
You can find a list of records that have had synchronization issues in the shuttle menu item called **Pending Sync**. You can sync the records manually once the issue notes in the error message have been resolved.

*Note:* If Oracle CX Enterprise Mobile detects a data conflict, the changes made in Enterprise Mobile will override any changes made in the Oracle Sales Cloud application.

### 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

Installing

What are the supported platforms for Oracle Sales Cloud Mobile?
See the System Requirements for Oracle Applications Cloud at: http://www.oracle.com/us/products/system-requirements/overview/index.html

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.

Related Topics
• Finding Your Company’s Host URL for Oracle Sales Cloud Mobile: Worked Example

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.

Related Topics
• Finding Your Company’s Host URL for Oracle Sales Cloud Mobile: Worked Example

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.

**Related Topics**
- Finding Your Company's Host URL for Oracle Sales Cloud Mobile: Worked Example

**How can I update the Oracle Sales Cloud Mobile application on my BlackBerry device?**
Enter the following URL in the BlackBerry browser: http(s)://host:port/sales/faces/MobileInstallerMain (replace the word "host" with the location of the latest version of Oracle Sales Cloud). Enter the authentication credentials to sign in, and click **Start Download** to start the download and installation of the latest version of Oracle Sales Cloud Mobile. Your existing Oracle Sales Cloud Mobile installation will be overwritten.

Note that Oracle Sales Cloud Mobile application is not available on BlackBerry App World.

**Configuring Off-line Access for Oracle Sales Cloud Mobile: Worked Example**
If your administrator requires that all data stored on devices, you must first configure offline access. By default, all data is encrypted and secured.

iOS users must perform the following tasks:

1. Swipe to open the side navigation panel
2. Tap **Configure Offline Mode**.
3. Install the profile when prompted.

Android users must perform the following tasks:

1. Open the **Settings** app on your Android device.
2. Tap **Security**.
3. Tap **Encryption**. Note: Your device may have a different label such as **Encrypt Tablet** or **Encrypt Device**.

**General Use**

**How can I navigate within the Oracle Sales Cloud Mobile client?**
On both the Apple iPhone and Blackberry mobile devices, tap any icon on the home page to show a list of items. For example, tap Opportunities to retrieve a list of your open opportunities. To view details, tap any item in the list view. Scroll upward in list view to access a search box. To access contextual actions, tap and hold any list item to reveal available contextual actions.

On the Apple iPhone, tap the **Title** bar to return to the application springboard. Select **Action** to reveal a contextual action sheet. Select **Action** again to close the action sheet.

On the Blackberry, both **Short** and **Full** menus are enabled. You can also use the **Back** button to return to the previous screen.

**Why can't I access Oracle Sales Cloud Mobile?**
You must have the Sales Representative duty role to access Oracle Sales Cloud Mobile. The delivered application has this role granted in the sales_representative, sales_manager, and sales_VP job roles.
How can I remove contacts, assignees, and resources from appointments, tasks, and interactions?

Navigate to the appointment, task, or interaction, and tap **Edit** to turn on the edit mode. Tap and hold on the contact, assignee, or resource you want to remove for two or three seconds. Then tap **Remove**, and tap **Done** to save your update.

Note that the owner of the appointment, task, or interaction can’t be removed.

How can I manage my activities in Oracle Sales Cloud Mobile?

While viewing an opportunity, lead, customer or contact, open **Activities**. By default, your current activities are shown. This list includes the activity subject, due date and an icon that denotes the type of activity.

When is data quality checked in Oracle Sales Cloud Mobile?

If your company has licensed and set up Oracle Sales Cloud Data Quality features, when you enter a new contact address, upon clicking Done, you are presented with a list of similar addresses. You can choose the closest match, merge the new information with the existing contact, or save the new contact you just entered.

How can I change my Primary Contact in an opportunity, account, or lead in Oracle Sales Cloud Mobile?

While viewing the contact list in the opportunity, account or lead, tap the Action list and choose **Change Primary Contact**. Tap and hold the desired contact name, then choose **Make Primary**.

How can I remove a contact from an opportunity, account, or lead?

While viewing the contact list in the opportunity, account or lead, tap the Action list and choose Remove Contact Association. Tap and hold the desired contact name, then choose Remove Contact.

How can I create customers and prospects in Sales Cloud Mobile?

When you create an account, you can create customers at the same time. Enter a name, and designate the customer as either a prospect or a customer. No additional information (such as address) is required. The account list displays both prospects and customers.

How can I work with reports and graphs in Sales Cloud Mobile?

You can swipe to navigate between reports, or tap to view a list of available reports. Once you are viewing a report, you can touch and hold on a slice of graph to see the aggregate values, for example, on a bar of bar graph, to see values for the bar. You can also double touch to drill down into the area of graph or see the report view, or pinch and zoom to zoom in or out on a graph.

Why can't I convert a lead to an opportunity?

You can only convert a lead to an opportunity when the prospect or customer associated to the lead is a sales account.

How can I create a search criteria that can be saved for use in the Oracle Sales Cloud Mobile application?

You can create saved search criteria for Apple and Android devices. Use either Page Composer or the Oracle Sales Cloud web interface to create the saved search. Select the auto-execute option to ensure that the search can be executed in the Oracle Sales Cloud Mobile application. Tap on the search name in Oracle Sales Cloud Mobile to execute the saved search.

How can I view saved search criteria?

Tap the magnifying glass icon in the list view to view a list of available saved searches. Execute the search by tapping on an individual saved search. Tap the search box to see additional fields where you can make changes to the search criteria.
Why can't I access the Around Me feature from Oracle Sales Cloud Mobile?
The Around Me feature is not available for BlackBerry devices. It is available only for devices that use the iOS and Android operating systems.

Why can't I view the Around Me results on a map?
Android devices display the Around Me results in a list view, and not on a map.

Can I delete the custom fields I have created for the Around Me feature?
Yes. If you created custom fields for the Around Me feature for earlier releases, you don’t have to maintain the fields with geocodes because the application no longer uses them.

Working Off-Line

Why can't I view updates to my data on Oracle Sales Cloud Mobile?
When the application is in the off-line mode, due to the absence of a network connection, you cannot view any updates that were made to the sales data since the application changed to the off-line mode. You can view data updates when you access the record again after regaining access to a network connection.

Why can't I create, edit, or delete any data in the Oracle Sales Cloud Mobile application?
Verify that you have network coverage. Data cannot be created, edited or deleted in off-line mode.

What data are available in the Oracle Sales Cloud Mobile off-line mode?
Oracle Sales Cloud Mobile saves up to 50MB of recently viewed data on the mobile device. After 50MB is reached, the application removes the oldest entries to make room for newer data. Data stored includes:

- A list of opportunities
- Specific opportunity details
- A list of contacts
- Customer details

When you are using the offline mode, you can view saved data. You can also save specific account records and their related objects for offline use by tapping the action menu when viewing the record, and saving the customer detail.

When the application can connect to a network and you can get back online, data is not automatically synchronized with the data updates that other people have made when you were offline. To view updated data, you must access the records again in online mode.

Note that custom objects are not available in offline mode.

Integration with Oracle Social Networks

Can I use Oracle Social Network within Oracle Sales Cloud Mobile?
Yes, you can invoke the Oracle Social Network application for the customer, opportunity, or contact you are viewing. Navigate to the detail view of the customer, opportunity, or contact, tap the Actions menu, then launch the Oracle Social Network application by tapping Conversations.
How can I use Sales Cloud Mobile to collaborate through Oracle Social Networking?
You can manually share and view information about opportunities, leads, and contacts in two ways. When you create an object, upon saving, you can share the object, or, while viewing an object’s details, you can tap Conversations in the Action sheet to see recent conversations.

You can also share information automatically. Automatic sharing means that a Social Object is created automatically in Oracle Social Network when an object such as an opportunity, lead or contact is created in Oracle Sales Cloud Mobile. For more information about sharing information automatically, see the Oracle Sales Cloud Social Network Administration: Overview help topic.

What types of attachments can I include in Oracle Sales Cloud Mobile?
You can create image (for example GIF or JPG) and audio files as attachments. You can view, but not save or create, PDF and Microsoft Office documents including Word (doc), PowerPoint (PPT) and Excel (XLS) attachments.

How can I view attachments offline in Oracle Sales Cloud Mobile?
To view an attachment offline, you must explicitly download it to your mobile device. In the attachment list view, tap the Actions menu to go into edit mode. Then, select one or more attachments to save locally and tap Done. When you tap Done, the attachment is saved locally for offline access.

How can I share attachments with my Oracle Social Network contacts from Oracle Sales Cloud Mobile?
In the attachment list view, tap on the action Post on OSN, then select one or more attachments, and tap Done.

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 allows 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
Installing

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

General Use

What is the Mobilytics Forecast Shaper?
Use the Forecast Shaper to review your sales team’s current quarter close against their quota in relation to the next quarters projected close. You can select the opportunity icon you want to move and drag it from the next quarter’s projected close
into the current quarter. The team attainment graph adjusts automatically as you move deals around. You can further analyze your forecast by filtering by team or team member to gauge individual contributions, or filter by deal size, product, industry, and country to analyze sales gaps or cherry picking.

The application tracks all proposed changes, but it does not write back to the sales cloud. However, you can send the proposed changes using pre-populated email or chat with your team using Oracle Social Network. You can also add notes and revert back to the original forecast by clicking the undo icons.

**Related Topics**
- Configuring Oracle Sales Cloud Mobilytics: Explained

**What is the Mobilytics Pipeline Analyzer?**
Use Pipeline Analyzer to:
- Review your pipeline in context of multiple sales stages to help improve conversion rates.
- Spot bottlenecks to help move deals into next stages.
- Find sales reps who maintain better practices.
- Check for unbalanced sales for products or industry.

**Related Topics**
- Configuring Oracle Sales Cloud Mobilytics: Explained

**What is the Mobilytics Deal Radar?**
Deal Radar helps you to discover the deals that are being actively managed. The closer the opportunity is to the target, the more activities are logged. The larger the deal, the bigger the circle. You can:
- Zoom in to view opportunity win probability in relation to team interactions.
- Apply filters to analyze possible product or industry problem areas.
- Drill into detail to review each opportunity's activities.
- Review your deals by current quarter versus activities.

**Related Topics**
- Configuring Oracle Sales Cloud Mobilytics: Explained

**What is the Mobilytics Aging Monitor?**
Aging Monitor helps you to keep your forecast on track. You can:
- Swipe up or down on the deal size axis to review the differences between older, larger deals and smaller deals.
- Filter by deal size, team member, product, and industry to analyze trouble areas.
- Use the time bar to hone in on older, stale deals, and chat with or email you team to close or kill these deals.

**Related Topics**
- Configuring Oracle Sales Cloud Mobilytics: Explained

**What is the Mobilytics Team Tracker?**
Team Tracker helps you to manage your team's performance. Use the nine card to view your team's standing based on this year's attainment percent and time in their current role. You can:
- View team ratings by manager.
• Filter by team member.
• Use the team ranking to help coach underperformers and team risks.
• Drill into each team member to review individual detail performance, accounts, and open deals.

Related Topics
• Configuring Oracle Sales Cloud Mobilytics: Explained

What reports are included in the interactive dashboard in Sales Mobile?
If you have the VP of Sales role you can view the following reports in the interactive dashboard:
• Sales Summary: Displays the target quota for the current quarter and shows opportunities that have been won, along with the forecast submitted by the team.
• Top Open Opportunity Map: Uses a map view to show top open opportunities for each region. Further drill down shows the sales reps in the region, the total revenue of the deals they are working, and the opportunity close date.
• Open Pipeline: Shows a consolidated view of open opportunities for the current and next quarter. Uses a map view to show opportunity revenue for each sales stage.
• Stalled Opportunities: Displays a pie chart that shows opportunities that are taking longer to move from one sales stage to the next. You can filter by number of days stalled in a given stage.
• Top Accounts: Shows accounts with closed and open opportunities for a given region in a tree map format.
• Team Performance: Illustrates a quick view of where sales teams stand against their quarterly goal. Traffic light indicators (red, yellow, and green) provide a consolidated view of sales representative quota attainment for the current quarter.
21 Using Social Networking

Social Networking: Overview

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

You can use Oracle Social Network for:

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

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

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

Adding Oracle Social Network in Oracle Sales Cloud: Overview

After the administrator has enabled Oracle Social Network in your environment, adding Oracle Social Network into your Oracle Sales Cloud pages is as simple as clicking a button.
Objects Enabled for Oracle Social Network

To share object records to Oracle Social Network as Social Objects, just click the Social link on a specific object record, then click the Join or Share button that appears.

FAQs for Using Social Networking

How can I share information with sales colleagues using Oracle Social Network?

Using Oracle Social Network conversations, you can associate collaborative discussions to a particular Oracle Applications Cloud object, even if some or all of the participants in the conversation don't have access to Oracle Applications Cloud. Oracle Social Network makes it easy to collaborate with colleagues who can share their knowledge or information about a particular object so you can be prepared with the most up to date data.

Objects you can tie conversations to include:

- Accounts
• Activity centers
• Contacts
• Households
• Leads
• Opportunities
• Partner accounts

The following example shows how to use Oracle Social Network to share information. The example is common to all object types, though the specifics might vary slightly by object.

1. Click the Social link to open Oracle Social Network.
2. Click Share if the object hasn’t already been shared, or Join to join the object. You can also add members to the wall, and post messages to the wall associated with the object.
3. Click New Related Conversation to create a new conversation about the object.
4. Add your knowledgeable colleagues to the conversation.
5. Post your questions to the conversation, and add follow-up flags to let your colleagues know you’re waiting for their responses.
6. When your colleagues respond (perhaps with Word documents or other useful files), you can annotate these files with additional questions and comments if necessary and then set another follow-up flag to alert your colleagues that you’ve updated them.
7. Continue the collaboration in the conversation as long as you need further details. If you need additional information, you can add more colleagues.

If you see the Social link in a Sales Cloud object, that’s your cue that social networking features are available for that particular object.

Ț Note: Oracle Social Network integration is only available with Oracle Cloud deployments.

Related Topics
• What does social networking have to do with my job?

How can I share opportunity information with sales colleagues using Oracle Social Network?

Using Oracle Social Network conversations, you can tie collaborative discussions to a particular Oracle Applications Cloud opportunity, even if some or all of the participants in the conversation don’t have access to Oracle Applications Cloud. Oracle Social Network makes it easy to collaborate with colleagues who can share their knowledge or information about a particular opportunity so you can be prepared with the most up to date data.

For example, suppose you are a sales representative who needs more information about the way regulations work in a particular territory, so you want to seek additional information from colleagues with knowledge of that territory. To do this:

1. Click the Social tab from within the specific opportunity to open Oracle Social Network.
2. Click Share if the opportunity hasn’t already been shared, or Join to join the opportunity. You can also add members to the wall, and post messages to the wall associated with the opportunity.
3. Click New Related Conversation to create a new conversation about the opportunity.
4. Add your knowledgeable colleagues to the conversation.
5. Post your questions to the conversation, and add follow-up flags to let your colleagues know you’re waiting for their responses.

6. When your colleagues respond (perhaps with Word documents or other useful files), you can annotate these files with additional questions and comments if necessary and then set another follow-up flag to alert your colleagues that you’ve updated them.

7. Continue the collaboration in the conversation as long as you need further details. If you need additional information, you can add more colleagues.

If the **Social** tab is visible in an opportunity, that's your cue that social networking features are available for that particular object.

*Note:* Oracle Social Network is currently available in Cloud implementations only.

**Related Topics**

- What does social networking have to do with my job?

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**How can I use social collaboration features to drive sales activity on my team?**

Using Oracle Social Network conversations, you can tie collaborative discussions to a particular Oracle Applications Cloud object. You can do this even if some or all of the participants in the conversation don’t have access to Oracle Applications Cloud. Oracle Social Network conversations let you make sure that your team is sharing information with each other, and bringing in other colleagues with relevant experience to add their knowledge to the discussion.

For example, suppose you are a sales manager who wants to encourage collaboration among both your team and any other people at your company who can provide information. To do this:

1. Review your team’s conversations, and identify any issues that they might need help with.
2. Add colleagues, both in your group and in other areas, who have knowledge about these issues.
3. If necessary, add documents to the conversation to update your newly added colleagues about the issue.

As another example, you notice that one of your team’s sales accounts hasn’t had any activity for two months, and you know that there’s a new product that might be a good fit for the customer. To facilitate collaboration:

1. Start a private conversation with a member of the product team to discuss the product and how well it meets the customer’s needs.
2. Schedule a meeting between you, the product team member, and the salesperson.
3. You and the other participants can post files, such as a slide deck, to the conversation for review prior to the meeting.
4. Participants can annotate the files with additional or updated information both before and after the meeting.

*Note:* Oracle Social Network is currently available in Cloud implementations only.

**Related Topics**

- What does social networking have to do with my job?
Managing Service Requests

Service Request Management: Overview

The service request management feature enables sales and service professionals to manage and deliver a streamlined service in response to service requests. Delivering consistent answers to customer questions help ensure that service requests are resolved efficiently and effectively.

Service request management lets salespeople:

- Create service requests
- Enter summary information into service requests
- Add products and product groups to service requests
- Organize service requests into queues
- Compose and send messages from service requests
- Add contacts to service requests
- Add team members to service requests
- Automatically or manually assign service requests to other users
- Create activities for service requests
- Share service request information using a social network
- Associate and view items in the knowledge base
- Integrate with the partners application to capture and resolve issues reported by your partner accounts

See the Oracle Engagement Cloud Using Service Request Management guide for more information about sales user tasks for service requests.

Related Topics

- Oracle Engagement Cloud Using Service Request Management guide
- Managing Service Requests: Overview

Service Request User Tasks: Overview

You can create and manage service requests once your sales administrator enables the service request offering. To create a service request (SR), select the Service Requests menu from the Navigator page, and on the Service Requests list page, click Create Service Request.

You can perform the following high-level user tasks for service request management:

- Capture service requests
  
  You can capture new service requests through user data entry, APIs, or file import.
• Organize and assign service requests

You can organize and assign service requests to queues either manually or using the Assignment Manager feature. You can also assign service requests to team members through the **Assign To** field in the service requests UI.

• Manage the lifecycle of a service request

A service request typically moves through the statuses: New, Waiting, In Progress, Resolved, and Closed. You can customize the statuses per your requirements if you have sufficient privileges.

See the Oracle Engagement Cloud Using Service Request Management guide for more information about sales user tasks for service requests.

See the Oracle Engagement Cloud Implementing Service Request Management guide for more information about service requests setup tasks.

**Related Topics**

- Oracle Engagement Cloud Using Service Request Management guide
- Oracle Engagement Cloud Implementing Service Request Management guide
- Managing Service Requests: Overview
23 Using Sales Lightbox

Sales Lightbox: Overview

With the Oracle Sales Cloud Lightbox content library, you can store, access, and share files, such as slide decks, web-based content, and .pdfs. The following is a high-level summary of the content library features:

- **Upload and access stored content**: Upload content from your computer to the library for later access and sharing. Supported file types include .pptx, .html (in the form of microsite .zip files), and .pdf. The image file types .jpg and .png are supported as separate file types as well.
- **Find content**: Browse and search for library content. Search includes file name, owner, and keywords.
- **Share content**: Share content with other users, with sales accounts, and with sales opportunities. Joint ownership also is supported.
- **Create new presentations on the fly**: For .pptx files only, assemble new slide decks using slides from the library.
- **Add to cart**: For .pptx files only, add slides to your cart.

The topic, Available Lightbox Actions for Different Content Types, has full details of the available actions for each file type.

Library Views

When you open the library, you see the following views:

- **My Content**: Displays all content that you own. This includes content that you have uploaded and all the content that was shared with you by other users. Documents can be shared with or without joint ownership.
- **Shared Content**: Displays all content that you own, and all the content that is shared with you by other users.

If you are an administrator, you also see the **All Content** view: This view displays all content uploaded by all users, including all content that belongs to the administrator. For more administrator information, see the Oracle Sales Cloud - Implementing Sales guide.

For more information about user tasks in the content library, see the online help and the Oracle Sales Cloud - Using Sales guide.

Available Lightbox Actions for Different Content Types

In the Oracle Sales Cloud Lightbox content library, different file types carry different available actions. For example, slides presentations can be added to the cart, but microsite and .pdf files cannot.
## Lightbox Actions for Different File Types

The following table displays the allowed actions with different Lightbox file types, along with additional information where necessary.

<table>
<thead>
<tr>
<th>Action</th>
<th>PowerPoints</th>
<th>PDFs</th>
<th>Microsites</th>
<th>Images</th>
<th>Additional Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Upload</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>• Slides must be .pptx files.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Microsites must be .zip files. See the topics, Using Microsites in the Lightbox Content Library and Creating and Uploading a Microsite .Zip File: Procedure: Procedure, for more information.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>• Image files must be .jpg or .png format.</td>
</tr>
<tr>
<td>Download</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>None</td>
</tr>
<tr>
<td>Update</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>None</td>
</tr>
<tr>
<td>Open</td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>None</td>
</tr>
<tr>
<td>Burst and assemble new slide decks from burst parts</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>Share</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Sharing is possible with other users, accounts, and opportunities, including joint ownership.</td>
</tr>
<tr>
<td>Add to cart</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
<td>No</td>
<td>None</td>
</tr>
<tr>
<td>Delete</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>The file owner can delete files that she owns. Administrators can delete any content.</td>
</tr>
<tr>
<td>Action</td>
<td>PowerPoints</td>
<td>PDFs</td>
<td>Microsites</td>
<td>Images</td>
<td>Additional Information</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------</td>
<td>------</td>
<td>------------</td>
<td>--------</td>
<td>------------------------</td>
</tr>
</tbody>
</table>
| Search          | Yes         | Yes  | Yes        | Yes    | • Slides: Can use file name, owner, or keyword in the document.  
                  |             |      |            |        | • PDFs: Can use file name, owner, or keyword in the document.  
                  |             |      |            |        | • Microsites: Can use file name or owner. If keyword search is enabled within the microsite, can search by keyword. If keyword search is not enabled, then the main .html file is scrubbed of HTML tags and stored as searchable content.  
                  |             |      |            |        | • Image files: Can use file name and owner. |
| View properties | Yes         | Yes  | Yes        | Yes    | • Slides: Can view file name, owner, number of slides, date and time uploaded, current version number, number of downloads, number of views, number of shares.  
                  |             |      |            |        | • PDFs: Can view file name, owner, date and time uploaded, views, |
About Bursting and Assembling Content

The terms burst and assemble have specific definitions in the context of the Lightbox content library.

- **Burst:** Users burst content when they open a file in Lightbox. The act of "bursting" refers to the application displaying the individual pages of a file as it’s opened. During this process, after splitting a file into individual pages, the application analyzes the pages, saves them, and creates records for them in the database.

- **Assemble:** Users assemble content when they save individual pages to a cart and download them. The act of "assembling" refers to when content with pages from one or more different files (of the same content type) is saved to the cart, potentially rearranged, and then downloaded. During assembly, in the background, the application compiles the files into a single file set.

For more information about using the content library, see the online help and the Oracle Sales Cloud - Using Sales guide.

Creating Content
Creating Lightbox Content: Overview

To be able to upload presentations to the Oracle Sales Cloud Lightbox content library, you first create them and then save them to your hard drive. Lightbox supports the following file types:

- **Microsoft PowerPoint**: The presentation library supports the Open XML file format (.pptx 2007). If you install the Microsoft Office Compatibility Pack, and save a presentation in the Open XML format (.pptx 2007), then those presentations are fully compatible with Sales Lightbox.
- **PDF**: You can upload .pdf files and share them with other users. However, you cannot open .pdf files in Lightbox or add them to the cart.
- **Microsites**: These are collections of html and supporting files, saved in a .zip compressed file type. For more information about this content type, see the topics, Using Microsites in the Lightbox Content Library and Creating and Uploading a Microsite .Zip File: Procedure.
- **Image files**: The image file types .jpg and .png are supported for upload and sharing as distinct pieces of content.

The topic, Available Lightbox Actions for Different Content Types, has full details of the available user actions for each file type.

Using Microsites in the Lightbox Content Library

You can use the Oracle Sales Cloud Lightbox content library to store and share microsite content. The content library supports multiple-page and single-page microsite content. You construct your microsite content in .zip file format. The .zip file contains the required .html and supporting files, such as images and cascading style sheets.

For a procedure about creating and uploading the microsite files, see the topic, Creating and Uploading a Microsite .Zip File: Procedure.

About the .Zip File

You create the microsite file structure on your hard drive and then you use a .zip compression utility to compress the files for upload. Only .zip compression format is allowed. The microsite's main landing page can have its own domain name or sub-domain name. Your .zip file structure determines whether Lightbox considers the microsite a single-page microsite or a multiple-page microsite.

- **Single-page microsite**: The .zip file contains no embedded .zip files and contains one .html (or .htm) file in the directory structure, along with additional supporting image files, cascading style sheet (.css) files, or JavaScript (.js) files in a separate folder.
- **Multiple-page microsite**: The .zip file contains embedded .zip files that contain one .html (or .htm) file in the directory structure, along with additional supporting image files, cascading style sheet (.css) files, or JavaScript (.js) files in a separate folder.

This topic contains examples of the supported folder construction for microsite .zip files.

The following rules apply to the .html files:

- For a single-page microsite, the .zip file must contain only one .html (or .htm) file at the top location in the folder. For multiple-page microsites, the embedded .zip files serve as independent microsite pages. That is, each embedded .zip file must contain all of the elements that a single-page microsite contains, including the .html file.
- The .html file must be named identically to the .zip file. For example, `visionservers.zip` must contain a file named `visionservers.html` (or .htm) at the top location in the folder.
• If a properly-named, full-sized thumbnail image is provided in the .zip file, the application uses it as the thumbnail.
  See the rules on image files following this text for more information.

The following rules apply to the image files:

• Supported image file types are .png and .jpg.
• To designate a thumbnail image in the microsite, include the image file at the same location as the .html file.
  and append -full to the file name. For example, in the visionservers.zip file, include an image file named
  visionservers-full.jpg.
• If no image is designated as the thumbnail, then Lightbox displays its default thumbnail image.

You can enable keyword search for microsites by including a text file with the keywords. See the section on enabling keyword
search for microsites later in this topic.

Naming and Structuring Microsite Files

For microsites to be accepted for upload into the content library, you must follow some rules for naming and structuring
the files. Each page must contain a folder of the same name, and that folder must contain an .html file of the same name.
Thus, visionservers.zip must contain a folder, visionservers. In that folder there must be a file, visionservers.html. It can
contain any number of other files and folders, but it must at least contain that file.

For a single-page microsite, you supply the .zip file that contains an .html file named the same as the .zip file. Optionally,
you also supply a thumbnail image, a text file for keyword search, and supporting files, such as a cascading style sheet and
JavaScript files.

The following figure shows an example of a well-constructed single-page microsite folder structure called visionservers.

```
/visionservers.zip
 /visionservers/
   visionservers.html
   visionservers-full.jpg
   visionservers-Searchdata.txt
 /css
 /fonts
 /img
 /js
```

For multiple-page microsites, you construct the .zip file as multiple .zip files within a parent .zip file.
The following figure shows an example of a well-constructed multiple-page microsite folder structure called visionservers.

visionservers.zip
/visionservers1.zip
  /visionservers1/
    visionservers1.html
    visionservers1-full.jpg
    visionservers1-Searchdata.txt
  /css
  /fonts
  /img
  /js
/visionservers2.zip
  /visionservers2/
    visionservers2.html
    visionservers2-full.jpg
    visionservers2-Searchdata.txt
  /css
  /fonts
  /img
  /js
/visionservers3.zip
  /visionservers3/
    visionservers3.html
    visionservers3-Searchdata.txt
  /css
  /fonts
  /img
  /js

Enabling Keyword Search for Microsites

You can add the ability for users to search for microsite files by keywords by adding a text file with the keywords to the microsite .zip file and naming the file appropriately. If keyword search is not enabled, then the main .html file is scrubbed of HTML tags and stored as searchable content. Use the following guidance when creating the text file:

- Use a text editor application, such as Microsoft Notepad, to create the text file.
- Name the text file with the same name as the .zip and .html files and append it with -Searchdata (note the file name is case sensitive). For example, name it visionservers-Searchdata.txt.
- Include the text (.txt) file in the same location as its corresponding .html file.
- Enter the keywords with only spaces between them.
- Do not use punctuation marks, such as commas or periods, in the text file.
The following is an example of a text file with keywords.

```
<table>
<thead>
<tr>
<th>visionservers-Searchdata.txt - Notepad</th>
</tr>
</thead>
<tbody>
<tr>
<td>File  Edit  Format  View  Help</td>
</tr>
<tr>
<td>content library microsite helloworld mymicrosite</td>
</tr>
</tbody>
</table>
```

Creating and Uploading a Microsite .Zip File: Procedure

After you have created your files and file structure for the microsite, you then must create a .zip file containing the folders and files in the correct structure.

Creating and Uploading Microsite Files

The following procedure shows the high-level steps to create and upload microsite .zip files to the content library. For more details about how to structure the folders for the .zip file, see the topic, Using Microsites in the Lightbox Content Library.

1. Create and store the .html and supporting files in a location on your computer. When creating the folder structure, you can use the examples in the topic, Using Microsites in the Lightbox Content Library.
2. Use a file compression application to add the files to a .zip file.
3. Sign in to the applications and navigate to Sales - Lightbox.
   
   The Lightbox page appears, showing content that is available to you.
4. In the My Content view, click Upload.
   
   The Upload Content dialog window appears.
5. Browse for the .zip file on your computer.
6. Click Open.
7. Click Upload in the Upload Content dialog window.
   
   A confirmation message lets you know of a successful upload.

Uploading Content

Uploading Lightbox Content: Explained

In the Oracle Sales Cloud Lightbox content library, you can upload content that you want to view later or share with other users.

For a procedure detailing how to upload content, see the topic, Uploading Lightbox Content: Procedure.
When you upload content, the application performs in the following way:

- If the content uploads successfully, then a thumbnail image appears on the My Content view after you refresh your view. After an initial upload, a placeholder thumbnail appears and post-upload processing continues. You can continue to work during this time.
- An error message appears if uploaded file is not a supported file type.
- After the initial file upload, post-upload processing extracts thumbnails, performs a virus check on the uploaded file, and so on. A confirmation message appears if the content has successfully uploaded. When the upload is complete, refresh your view to see the content thumbnail image and to access the content.
- If post-upload processing fails, and if a preferred notification method has been configured for you, for example, e-mail notifications, then you receive a message explaining that an error occurred. If this error occurs, contact your administrator. Any content that fails the post-upload process is removed from the My Content view.
- If you sign out during an upload, then post-upload processing continues.

\[Note\]: The maximum file size of a content that can be uploaded is 100 MB.

### Uploading Lightbox Content: Procedure

In the Oracle Sales Cloud Lightbox content library, you can upload content that you want to share with other users. You also can share content with a potential sales opportunity or with an account.

#### Uploading Content

Use the following procedure to upload new content.

1. Navigate to **Sales - Lightbox**.
   The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.
2. In the **My Content** view, click **Upload**.
   The Upload Content dialog window appears.
3. Click **Browse**. Browse for and select the content you want to upload from a location on your computer.
4. Click **Open** or double-click the file.
5. Click **Upload** in the Upload Content dialog window.
6. A confirmation message lets you know of a successful upload.
7. After the upload is complete, refresh your view to see the new thumbnail images for the content, and to access the content.

#### Updating Content

### Updating Lightbox Content: Explained

In the Oracle Sales Cloud Lightbox content library, you can replace or overwrite existing content that you own. For example, you might have already shared content with other users, but you want to replace the original content with a version containing newer data.
For a procedure detailing how to update an existing content, see the topic, Updating Lightbox Content: Procedure.

When you update content, the application performs in the following way:

- During post-upload processing, the placeholder thumbnail images change, but the file name remains the same for the newer content. You can continue to work during this time.
- If you are updating content while another user wants to use the content, for example, to add the content to the cart or to share the content, the other user can do so safely, and the current version of the content is used.
- When you are updating content, any search results for that content display the previous version of the content.
- If you attempt to update content while another user is already updating or deleting the content as a joint owner, then you receive a message that an update is in progress, and to try again later.
- While the update is in progress, the content properties panel is available and a dynamic circle image is overlaid on the thumbnail, providing visual feedback that a new upload is processing.
- While the update is in progress, other users can open the previous version of the content.
- If you decide to update content with content that has a different name than the original content, then the name of the original content is kept, and only the content slides are updated.

After you update content, the application performs in the following way:

- If the content is successfully updated, then the content displays as the first document in the list.
- If the content fails to update, then the existing version remains in place and you receive an e-mail notification confirming that the update failed.
- The cover thumbnail image for the new content is determined by the previously selected cover thumbnail image. For example, if slide number 5 was the previous cover thumbnail, then slide number 5 is also selected for the new content. If the slides are re-ordered, then a different cover thumbnail is displayed.
- If the number of slides in content is reduced, then the thumbnail for the first slide is the cover thumbnail. For example, if slide number 20 was selected as the cover thumbnail for the previous content, but the new content only contains 10 slides, then the thumbnail for the first slide is the cover thumbnail for the content.
- When the content is fully updated, the Version and Uploaded properties are updated accordingly.
- The contents remain shared and the ownership remains shared with other users.
- Each time you update a specific content, the content is listed at the start of the content list in the My Content view.

### Updating Lightbox Content: Procedure

In the Oracle Sales Cloud Lightbox content library, you can replace or overwrite existing content that you own. For example, you might have already shared content with other users, but you want to replace the original content with a version containing newer data.

#### Updating Content

Use the following procedure to update content.

1. Navigate to **Sales - Lightbox**.
   
   The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. In the **My Content** view, locate the content you want to replace and update.

3. From the **Actions** menu, click **Update**.
The Upload new version of Content dialog window appears.

4. Click **Browse**. Browse for and select the updated content from a location on your computer.

5. Click **Open** or double-click the file.

6. Click **Upload**.

   A confirmation message lets you know of a successful upload.

7. After the update is complete, refresh your view to see the new thumbnail images for the content, and to access the content.

---

### Searching for Content

#### Searching for Lightbox Content: Explained

In the Oracle Sales Cloud Lightbox content library, you can search for content by file name, owner, or keyword. The search finds content that you own or that is shared with you by other users. As soon as a file is uploaded and processed, it is available in the search results.

For a procedure detailing how to search content, see the topic, **Searching for Lightbox Content: Procedure**.

When performing a search, consider the following:

- Searches are not case-sensitive. For example, searching for *America* returns the same results as searching for *aMERICA*.
- The search returns partial word matches. For example, if you search for *mas*, the application finds files containing the words *Masterson*, *Master*, and *Mask*.
- You can use the percent sign (%) as a wildcard at the beginning of a string. For example, if you perform a search for `%ore`, the application returns all content containing *core*, *sore*, and so on.
- You can search for file names that contain special and accented characters such as ampersands (&).
- The order of keywords within the search string is irrelevant. All keywords must match, to match the search string text in file names and content. The Boolean AND operator is implicit. That is, you do not enter the Boolean AND operator in your search string. The application automatically inserts it between each keyword (or between keywords and phrases) in the search string.
- From the search results, you can perform the allowed activities with the content. See the topic, **Available Lightbox Actions for Different Content Types**, for more information about the allowed actions.

#### Searching for Lightbox Content: Procedure

In the Oracle Sales Cloud Lightbox content library, you can search for content by file name, owner, or keyword. The search finds content that you own or that is shared with you by other users. As soon as a file is uploaded and processed, it is available in the search results.

For more information about the Sales Lightbox search actions and tips, see the topic, **Searching for Lightbox Content: Explained**.
Searching for Content

Use the following procedure to search for content containing a specific word or text.

1. Navigate to Sales - Lightbox.
   
   The Lightbox page appears, showing content available to you.
2. In My Content or Shared Content views, click the magnifying glass icon located at the top-right of the screen.
3. Enter the text that you want to find in the search field, and press Enter or click the search icon.
4. Use the Actions menu to download the content or add it to your cart (if applicable). To open the content (if allowed), click the content name.

See the topic, Available Lightbox Actions for Different Content Types, for more information about the allowed actions.

Search results remain available until you perform a new search in your current session.

Downloading and Opening Content

Downloading Lightbox Content: Procedure

Using the Oracle Sales Cloud Lightbox content library, you can download content that is shared with you. You also can download .pptx slides that you added to your cart.

You can download content from the following locations in Sales Lightbox:

- The Shared Content view
- The My Content view
- The cart

⚠️ Note: Only .pptx slides can be added to the cart; therefore, this is the only content type you can download from the cart.

Downloading Content from the Lightbox Page

Use the following procedure to download content from the Lightbox page. To filter the view of the content, you use the Shared Content and My Content view filters.

1. Navigate to Sales - Lightbox.
   
   The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.
2. In the My Content or Shared Content views, click the Actions menu on a content item and select Download.
3. Do one of the following:
   
   - In the open file window, click Save to save the content to your computer’s local drive.
   - In the open file window, click Open to open the content and then save the content to your computer’s local drive.

After the content is saved and the download is complete, the download properties for each slide are updated.
Downloading Slides from the Cart

This procedure applies only to .pptx slides. Other content types cannot be added to or downloaded from the cart. Use the following procedure to assemble all slides in your cart into a single slide deck and download them to your computer’s local drive.

**Note:** Slides must first be added to the cart in order for you to be able to download them from the cart. See the topic, Managing Your Cart: Explained, for more information.

1. Navigate to Sales - Lightbox.
   The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. Click Cart to open the cart.

3. Click the Download button.

4. Do one of the following:
   - In the open file window, click Save to save the content to your computer’s local drive.
   - In the open file window, click Open to open the content in Microsoft PowerPoint and then save the content to your computer’s local drive.

After you save the content, the download property for each slide is updated. The slides remain in the cart until you remove them.

Opening Lightbox Content: Procedure

In the Oracle Sales Cloud Lightbox content library, you can open your own content and content that has been shared with you.

Opening content lets you:

- View the thumbnail images of PowerPoint slides (if available) in a dialog box.
- View thumbnail images of multiple-page microsites (if images have been provided) in a dialog box.
- Set a particular slide as the content’s cover thumbnail image (for slide presentations and microsites).
- Add individual slides from slide presentations to your cart.
- View content properties, such as the number of times the content was downloaded or shared.

**Note:** Note that you cannot open .pdf files from the library. When you click on the link for a .pdf file, you see a single thumbnail representing the entire document, instead of individual thumbnail images of each page.

Opening Content

Use the following procedure to open content.

1. Navigate to Sales - Lightbox.
   The Lightbox page appears, showing content that is available to you.

2. In the My Content or Shared Content views, find the content you want to open.
   You can also locate content by performing a search. Files are listed in the chronological order in which they were uploaded.
3. To open content, do one of the following:
   - Click the Actions menu and select Open.
   - Click the file name link under each thumbnail.
   - From search results, click the content name.

Managing Your Cart: Explained

You can use the cart in the Oracle Sales Cloud Lightbox content library to add and assemble Microsoft PowerPoint (.pptx) slides that are available to you. Other content types, including .pdfs, microsites, and image files, cannot be added to the cart.

The following are the tasks for the Lightbox cart:

- Adding a presentation to the cart
- Adding a slide to the cart
- Removing slides from the cart
- Emptying the cart
- Downloading slides from the cart
- Arranging the slide order in the cart

Tip: The current number of slides you have in your cart is always indicated on the Cart button. And the number of slides in a presentation is shown next to the Add to Cart action.

Adding All Slides in a Presentation to the Cart

To add all the slides of a presentation to the cart, do the following:

1. Navigate to Sales - Lightbox.

   The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. In the My Content or Shared Content views, locate the presentation you want to add to the cart.

3. Do one of the following:
   - Click the plus sign (+) icon located at the top center of the thumbnail to add the presentation to the cart.
   - Click the Actions menu and select Add to Cart.

   A confirmation message notifies you of a successful addition to the cart.

Adding a Single Slide to the Cart

To add a single slide to the cart, do the following:

1. Navigate to Sales - Lightbox.

   The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. In the My Content or Shared Content views, open the presentation that contains the slide you want to add to the cart. Open the presentation by clicking the Actions icon and then clicking Open.
3. To add a single slide of the presentation to the cart, do one of the following:
   - Click the plus sign (+) icon located at the top center of the slide that you want to add to the cart.
   - Click the Actions menu and select Add to Cart.

   A confirmation message notifies you of a successful addition to the cart.

4. Click Done to return to the My Content or Shared Content views.

Note: If a slide in your cart has its corresponding presentation deleted, then the slide remains in the cart, but the slide properties are unavailable.

Removing Slides from the Cart

To remove a slide from the cart, do the following:

1. Navigate to Sales - Lightbox.

   The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. Click Cart and find the slide you want to remove.

3. Do one of the following:
   - Click the minus sign (-) icon located at the top center of the slide that you want to remove from the cart.
   - Click the Actions menu and select Remove.

4. Click Yes on the confirmation message.

5. Click Done to return to the My Content or Shared Content views.

Emptying the Cart

To empty the cart:

1. Navigate to Sales - Lightbox.

   The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. Click Cart to view your cart.

3. Click Clear Cart.

Downloading from the Cart

To download all slides from the cart into a single presentation and save them to your computer's local drive, do the following:

1. Navigate to Sales - Lightbox.

   The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. Click Cart to open the cart.

3. Click Download.

4. Do one of the following:
   - In the open file window, click Save to save the presentation to your computer's local drive.
   - In the open file window, click Open to open the presentation in Microsoft PowerPoint and then save the presentation to your computer's local drive.
After you save the presentation, the application updates the properties information for the slide. The slides remain in the cart until you remove them.

5. Click Done to return to the My Content or Shared Content views.

Arranging the Slide Order in the Cart

To change the order in which slides appear in the cart, do the following:

1. Navigate to Sales - Lightbox.

The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. Click Cart to open the cart.

3. In the cart, find the slide you want to move.

4. Do one of the following:

   - Drag and drop the slides to where you want them.
   - Click the Actions menu and select Move Left or Move Right.
   - Click the left or right arrow located at the top center of the thumbnail.

5. Click Done to return to the My Content or Shared Content views.

Sharing Content

Sharing Lightbox Content: Overview

In the Oracle Sales Cloud Lightbox content library, you can share content with:

- Opportunities
- Accounts
- Users

You can also select a user to be the joint owner of a content item along with you.

Sharing Content with Opportunities and Accounts

You can share your content with accounts and opportunities. When you share content with an opportunity or an account, you are essentially attaching a copy of the content to the opportunity or account you select. Note the following:

- You can only share content with an account or an opportunity if you have access to Sales Cloud accounts or opportunities applications.
- If you make any changes to the content after you share it with an opportunity, the shared document is not affected.

Sharing Content with Other Users

You can share content with another user without granting joint ownership. The following table indicates which actions the other user can perform after the content is shared. All content that is shared without joint ownership is available in the user’s Shared Content view.
### Sharing Content with a User as the Joint Owner

If you own a content item, you can share it with a user and grant joint ownership to that user. The following table indicates which actions the other user can perform when the content is shared with joint ownership. All content that is shared with joint ownership is available in the user’s My Content view.

<table>
<thead>
<tr>
<th>Actions</th>
<th>User Permission?</th>
</tr>
</thead>
<tbody>
<tr>
<td>View content</td>
<td>Yes</td>
</tr>
<tr>
<td>Download content</td>
<td>Yes</td>
</tr>
<tr>
<td>Share content without joint ownership</td>
<td>Yes</td>
</tr>
<tr>
<td>Update content</td>
<td>No</td>
</tr>
<tr>
<td>Share content with joint ownership</td>
<td>No</td>
</tr>
<tr>
<td>Delete content</td>
<td>No</td>
</tr>
</tbody>
</table>

For procedures details sharing activities, see the additional topics on sharing content.

### Sharing Lightbox Content with an Opportunity: Procedure

In the Oracle Sales Cloud Lightbox content library, you can attach a copy of a content to an opportunity. If you make any changes to the content after you share it with an opportunity, the shared document is not affected. You can only share content with an opportunity if you have permission to access the opportunities application.

**Sharing Content with an Opportunity**

Use the following procedure to share content with an opportunity.

1. Navigate to **Sales - Lightbox**.
The Lightbox page appears, showing content that is available to you.

2. In the **My Content** or **Shared Content** views, click the **Actions** menu and select **Share Content with Opportunity**.

The search and select page for opportunities appears.

3. Search for and select the opportunity.

4. Click **OK**.

A confirmation message lets you know that the content was successfully shared.

---

**Sharing Lightbox Content with a User: Procedure**

In the Oracle Sales Cloud Lightbox content library, you can share your content with other Sales Cloud users. After you share content with another user, the content appears in the user’s Shared Content view. If you make any changes to the content after you share it with a user, these changes are visible to all users with whom the document has been shared. You can only share content with a user who has access to Sales Lightbox, and if the content owner has granted you joint ownership.

**Sharing a Presentation with a User**

Use the following procedure to share content with a user.

1. Navigate to **Sales - Lightbox**.

   The Lightbox page appears, showing content that is available to you.

2. In the **My Content** or **Shared Content** views, click the **Actions** menu and select **Share Content with User**.

   The search and select page for users appears.

3. Search for and select the user.

4. Click **OK**.

   A confirmation message lets you know the content was successfully shared.

---

**Sharing Lightbox Content as Joint Owner: Procedure**

In the Oracle Sales Cloud Lightbox content library, you can share your content with other Sales Cloud users and make them joint owners of the content. If you make any changes to the content after you share it with a user, these changes are visible to all owners with whom the document has been shared. When you share a document with a user with joint ownership, that user is allowed to update and delete that document. You can only share a content with a user as joint owner if the user has access to Sales Lightbox, and if the content owner has also granted you joint ownership.

**Sharing Content with a User as Joint Owner**

Use the following procedure to share content with a user as joint owner.

1. Navigate to **Sales - Lightbox**.

   The Lightbox page appears, showing content that is available to you.

2. In the **My Content** or **Shared Content** views, click the **Actions** menu and select **Share Content with User as Joint Owner**.

   The search and select page for users appears.
3. Search for and select the user.
4. Click OK.

A confirmation message lets you know the content was successfully shared.

Sharing Lightbox Content with an Account: Procedure

In the Oracle Sales Cloud Lightbox content library, you can attach a copy of a content item to an account. If you make any changes to the content after you share it with an account, the shared document is not affected. You can only share content with an account if you have permission to access the sales accounts application.

Sharing Content with an Account

Use the following procedure to share content with an account.

1. Navigate to Sales - Lightbox.
The Lightbox page appears, showing content that is available to you.
2. In the My Content or Shared Content views, click the Actions menu and select Share Content with Customer.
The search and select page for accounts opens.
3. Search for and select the account.
4. Click OK.

A confirmation message lets you know that the content was successfully shared.

Working with Thumbnail Images

Setting a Slide as a Cover Thumbnail: Explained

When using .pptx slide decks as content in the Oracle Sales Lightbox content library, you can set one slide in the slide presentation as the cover thumbnail image. These images help users identify the contents of items in the library.

For a procedure detailing how to set a cover thumbnail image, see the topic, Setting a Slide as a Cover Thumbnail: Procedure.

Before you set a slide as a cover thumbnail image, consider the following:

- If you do not set a cover thumbnail, then a default cover thumbnail is assigned. The default cover thumbnail is either the last slide used as a cover thumbnail or the first slide in the presentation.
- If you explicitly set a cover thumbnail for a presentation once, then the cover thumbnail remains the same unless you explicitly change it again.
- If you are the owner of the document and set the cover thumbnail, then the cover you set becomes the cover thumbnail for you and for all other users with whom this document is shared, who have not explicitly set their own cover thumbnail.
- If you own a document jointly with other users, and you and a second user have changed the cover thumbnail from the default cover, then all other document owners who have not set a new cover will see the most recently set thumbnail as the new cover.
Setting a Slide as a Cover Thumbnail: Procedure

When using .pptx slide decks as content in the Oracle Sales Lightbox content library, you can set one slide in the slide presentation as the cover thumbnail image. These images help users identify the contents of items in the library.

Choosing a Slide as a Cover Thumbnail

Use the following procedure to set a slide that you want to display as the cover thumbnail image for a presentation.

1. Navigate to Sales - Lightbox.
   
The Lightbox page appears, showing presentations that are available to you.
2. In the My Content view, open the presentation.
3. Click the star icon on the target slide to set the slide as the cover thumbnail.

When a slide is set as the cover thumbnail, the star icon on it changes to a filled gray star.

Deleting Content

Deleting Lightbox Content: Explained

In the Oracle Sales Cloud Lightbox content library, you can delete content that you own. When you delete content, it’s no longer available to you or to others.

For a procedure detailing how to delete content, see the topic, Deleting Lightbox Content: Procedure.

If, before deleting a content item, you shared the content item with other users who are currently working with the content you deleted, one of the following scenarios might occur:

- If you are browsing through content library that includes deleted content, the deleted content is not available when the page is refreshed.
- If you are browsing through content that has been deleted since you started browsing, when you scroll to the next set of content, a warning message indicates that the content has been deleted. You are then returned to the view prior to opening the content, for example, the Shared Content view.
- If you are browsing through a content that has been deleted since you started browsing, and if you click Show Content Properties or another menu option, then a warning message indicates that the content has been deleted. You are then returned to the view that was active prior to opening the file, for example, the Shared Content view.
- In the case of slide decks, if you have already added slides from a deleted content to the cart, the thumbnail images of the slides remain visible and available for you to view and to download from the cart until they are manually removed from the cart, or until the cart is cleared. However, the slide properties are unavailable for the deleted slides.
- If you try to directly download a deleted content from the Actions menu or from one of the views, a warning message indicates that the content has been deleted and the content is not downloaded.
- If a deleted content item is displayed in search results and you attempt to select or open that content, then a warning message indicates that the content has been deleted. You cannot interact further with the search result item.
Deleting Lightbox Content: Procedure

In the Oracle Sales Cloud Lightbox content library, you can delete content that you own. When you delete content, it’s no longer available to you or to others.

Deleting Content

Use the following procedure to delete content.

1. Navigate to **Sales - Lightbox**.
   
   The Lightbox page appears, showing contents that are available to you.

2. In the **My Content** view, locate the content you want to delete.

3. Click the **Actions** menu and select **Delete** from the menu.

4. Click **Yes** to confirm the deletion.

**Note:** If you are a sales administrator or a setup user, you can delete any content from the **All Content** view. This view is available only to sales administrators and setup users.
Glossary

**academic level**
Academic level are categories of programs, for example, undergraduate, graduate, certificate, and continuing education, which can be used to assign inquiries to the appropriate student recruiters.

**adjusted forecast**
Total forecast for all product items that meet forecast criteria plus a salesperson's adjustment amount, which can be a positive or negative number.

**admissions coordinator**
Admissions coordinators manage student recruiters and assign organizations and inquiries to them based on defined territories for the upcoming recruiting season, depending on the enrollment goals set by the academic institution.

**assemble**
Refers to when, in the Oracle Sales Cloud Lightbox content library, content with pages from one or more different files is saved to the cart, potentially rearranged, and then downloaded. The content must be of the same file types. During assembly, in the background, the application compiles the files into a single file set.

**B2B**
Acronym for business-to-business. Indicates the type of customer relationship with a business, where the customer is a business rather than an individual consumer.

**B2C**
Acronym for business-to-consumer. Indicates the type of customer relationship with a business, where the customer is an individual consumer rather than a business.

**burst**
Refers to when, in the Oracle Sales Cloud Lightbox content library, the application displays the individual pages of a file as it’s opened. During this process, the application doesn’t just open the individual pages. Instead, after splitting a file into individual pages, the application analyzes the pages, saves the pages into the content management system, and creates records for the pages in the database.

**customer**
A customer is someone with whom you have a selling relationship. The selling relationship can result from the purchase of products and services, or from the negotiation of terms and conditions that provide the basis for future purchases.
**deal size**
Total monetary amount the customer is expected to spend.

**eligibility rule**
Rules that define what can or cannot be sold to what customers based on a set of eligibility or business criteria, such as due to company policy or customer eligibility constraints. Eligibility rules are evaluated before any recommendations can be made.

**global area**
The region at the very top of the user interface that remains the same no matter which page you’re on.

**industry codes**
Industry codes gives you the flexibility to assign the most accurate industry to your account that defines your account better. You can add or remove industries from your account as long as you have edit access to your account.

**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.

**internal expert**
Experts within your company who have previous experience with a specific competitor.

**lead rank**
A configurable set of values such as hot, warm, or cool used to prioritize leads for lead qualification and sales engagement.

**legal entity**
An entity identified and given rights and responsibilities under commercial law through the registration with country’s appropriate authority.

**line of business**
A particular kind of commercial enterprise. For example, a broad grouping of sellable products such as hardware or training.

**microsite**
Individual web page or a small cluster of pages meant to function as a discrete entity within an existing web site or to complement an offline activity.

**organization types**
You can maintain multiple organization types for your account that can help you define your account better. You can add or remove organizations from your account as long as you have edit access to your account.
**prediction rules**
A user-defined business logic that identifies target customer segments for target products based on a set of criteria. Prediction rules predict the likelihood of target customers to buy a product, the average revenue, and the average sales cycle that salespeople could expect.

**programs of interest**
Programs of interest refer to the academic programs that a prospective student might be interested in such as art, biology, history, chemistry, and so on.

**prospect**
A prospect can be account, contact, or household you haven't sold to yet. A prospect is a potential customer, who you hope to convert into a selling relationship.

**prospective student**
A prospective student is someone who has expressed interest in enrolling to your institution.

**qualified lead**
A qualified lead is one where the lead qualification status has been updated to qualified. Generally, a lead is considered qualified and ready for conversion to a sale when the need, purchase interest, and budget are confirmed.

**request call back**
A marketing response form that can be inserted into an e-mail. E-mail recipients can click the link to request a call back.

**sales account**
Parties with the usage Sales Account and a sales account profile containing sales information specific to the party. When a party has one sell to address, it ceases to be a sales prospect and becomes a new sales account. When the party purchases something, it changes from a new to an existing sales account.

**sales campaign**
A sales campaign enables a salesperson to target customer contacts by e-mail in a personalized campaign, using marketing generated collateral.

**springboard**
The grid of icons on the home page or the strip of icons above all simplified pages. Use the icons to open pages.

**student recruiter**
Student recruiters are representatives of an academic institution assigned to organizations and inquiries for recruiting purposes.

**SWOT**
Abbreviation for strengths, weaknesses, opportunities, and threats. SWOT analyses score the strengths, weaknesses, opportunities, and threats of a sales competitor, as compared to the selling company.
**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 coverage model**
The coverage model selection identifies whether the territory jurisdiction is expressed in terms of what customers are covered, or what partners are covered. A Customer Centric model means that the territory covers all customers within the territory definition, as well as leads and opportunities for those customers. Partner Centric territories are typically defined for channel sales managers, where the channel sales manager is responsible for a set of partners, as well as for those partners’ deals.

**white space analysis**
A type of analysis that enables salespeople to identify gaps in the customer’s portfolio so that they can focus on selling products or services that fill those gaps.