Oracle
Sales Cloud
Implementing Marketing

Release 12

This guide also applies to on-premises implementations
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Preface

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

Oracle Applications Help

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

Using Applications Help

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

Additional Resources

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

Documentation Accessibility

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

Comments and Suggestions

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

Audience and Scope

This guide provides conceptual information and procedures needed to implement marketing components and features of Oracle Sales Cloud. It is intended for sales administrators, and in some cases, application implementors, as they implement, configure, and use administrative components of the cloud service.

This guide provides information about:

- Understanding Marketing Setup Tasks
- Using Profile Options, Lookups, and Scheduled Processes
- Setting Up Common Components
- Setting Up Geographies and Territories
- Setting Up Multiple Currencies
- Setting Up Accounts and Contacts
- Setting Up Common Marketing
- Setting Up Work Assignment
- Setting Up Price Books and Promotions
- Understanding E-Mail Server
- Understanding Segmentation Manager

Note: This guide assumes that you have used the Oracle Sales Cloud Getting Started with Your Implementation guide to complete your initial setup.

This guide does not cover:

- Initial tasks to set up your cloud service. These tasks are covered in the Oracle Sales Cloud Getting Started with Your Implementation guide. It is assumed you have used the getting started guide to complete your initial setup before performing the tasks in this implementation guide.
- Tasks required to integrate with another cloud service, in addition to Sales Cloud. For these tasks, see the relevant documentation for the additional cloud service.
- Tasks typically performed in the cloud service by sales users, such as sales representatives and sales managers. For those tasks, see the Oracle Sales Cloud Using Sales guide.
- Most customization tasks, such as adding fields, changing field labels, and the like. For these procedures, see the Oracle Sales Cloud Customizing Sales guide.

The Related Guides topic in this chapter contains lists of the other guides you may want to consult as you implement, configure, and use Sales Cloud.

Related Topics

- Oracle Sales Cloud Help Center Guides
- Oracle Help Center - All Guides
Related Guides

You might want to consult other guides in addition to this one as you implement, administer, maintain, and use Oracle Sales Cloud.

Implementation Guides

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

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
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<tr>
<td>Oracle Sales Cloud Getting Started with Your Implementation</td>
<td>Describes your initial Oracle Sales Cloud service implementation procedures, based on a simple sales-force-automation use case.</td>
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<tr>
<td>Oracle Sales Cloud Implementing Customer Data Management</td>
<td>Contains information to help implementors define the setup for managing customer information and the configuration for customer hub deployment.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Enterprise Contracts</td>
<td>Contains conceptual information and procedures that you perform to implement the contract management features of Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Incentive Compensation</td>
<td>Contains information about implementing sales compensation and payment plans.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Marketing</td>
<td>(This guide) Provides conceptual information and the procedures that you perform to implement the marketing components and features of Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Sales</td>
<td>Describes the tasks that you perform to configure and set up Sales.</td>
</tr>
<tr>
<td>Oracle Engagement Cloud Implementing Service Request Management</td>
<td>Contains conceptual information and procedures that you perform to implement service request management features.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Understanding File-Based Data Import and Export</td>
<td>Contains information to help those charged with exporting and importing object data.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Securing Oracle Sales Cloud</td>
<td>Contains information to help setup users and sales administrators configure access to Oracle Sales Cloud functionality and data.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Security Reference</td>
<td>Lists the predefined security data that is included in the Sales offering.</td>
</tr>
</tbody>
</table>
User 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>
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<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 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>
<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 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 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 Sales</td>
<td>Describes the tasks that help sales managers, salespeople, and other sales end users to perform day-to-day business tasks.</td>
</tr>
<tr>
<td>Oracle Engagement Cloud Using Service Request</td>
<td>Contains information to help service managers, service personnel, and other service end users to create and manage service requests.</td>
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Analytics Guide

The following table lists the Sales Cloud analytics and reports guide.

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<th>Title</th>
<th>Description</th>
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<tr>
<td>Oracle Sales Cloud Creating and Administering Analytics</td>
<td>Provides advanced instruction on creating and customizing Sales Cloud analytics and reports.</td>
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Customization Guides

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

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<th>Title</th>
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<td>Oracle Sales Cloud Getting Started with Oracle Sales Cloud Customizations</td>
<td>Introduces you to user interface elements, user interface types, and simple, common customizations of Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Title</td>
<td>Description</td>
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<tr>
<td>----------------------------------------------------------------------</td>
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<tr>
<td>Oracle Sales Cloud Customizing Sales</td>
<td>Describes how to create and extend objects and customize the user interfaces and navigation menus.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Groovy Scripting Reference for Application Composer</td>
<td>Explains the basics of how you to use the Groovy scripting language to enhance Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Applications Cloud Customizing the Applications for Functional Administrators</td>
<td>Describes the tools and concepts for customizing and extending the applications.</td>
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**Common Applications Guides**

The following table lists Oracle Cloud guides for common features.

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

- Oracle Help Center
2 Getting Started

Prerequisites

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

System Requirements

Oracle cloud applications have specific system requirements, including supported resolutions when using internet web browsers. In addition, access to the applications using mobile devices requires additional considerations. You can find the latest system requirements and supported browser resolution settings on the system requirements page at http://www.oracle.com/us/products/system-requirements/overview/index.html. For previous releases, scroll to the bottom of the page and find the system requirements link for the applicable previous release.

Related Topics

- System Requirements for Oracle Applications Cloud

Useful Toolbar Icons

The following figure explains the most useful toolbar icons.

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

Setup and Maintenance: Overview

Oracle Functional Setup Manager enables rapid and efficient planning, configuration, implementation, deployment, and ongoing maintenance of Oracle Applications through self-service administration.

All Oracle Functional Setup Manager functionality is available from the Setup and Maintenance work area, which offers you the following benefits:

- **Self-Service Administration:**
  Manage all aspects of functional setup of Oracle Fusion applications at the business user level with an integrated, guided process for planning, configuration, implementation, deployment, and maintenance.

- **Configurable and Extensible:**
  Configure and extend prepackaged list of tasks for setting up Oracle Fusion applications to better fit your business requirements.

- **Complete Transparency:**
  Get full visibility of Oracle Fusion applications end-to-end setup requirements with auto-generated, sequential task lists that include prerequisites and address dependencies.

- **Prepackaged Lists of Implementation Tasks:**
  Task lists can be easily configured and extended to better fit with business requirements. Autogenerated, sequential task lists include prerequisites and address dependencies to give full visibility to end-to-end setup requirements of Oracle Applications.

- **Rapid Start:**
  Specific implementations can become templates to facilitate reuse and rapid-start for comparable Oracle Applications across many instances.

- **Comprehensive Reporting:**
  A set of built-in reports helps to analyze, validate and audit configurations, implementations, and setup data of Oracle Applications.

With Oracle Functional Setup Manager you can:

- Learn about and analyze implementation requirements.
- Configure Oracle Applications to match your business needs.
- Achieve complete visibility to set up requirements through guided, sequential task lists downloadable into Excel for project planning.
- Enter setup data through easy-to-use user interfaces available directly from the task lists.
- Export and import data from one instance to another for rapid setup.
- Validate setup by reviewing setup data reports.
- Implement all Oracle Applications through a standard and consistent process.
Marketing Offering: Overview

Using the marketing business process area, your enterprise can create consumer awareness of your products or services. You can send marketing messages directly to consumers and pursue prospects to become well qualified leads for your organization’s sales force. Use marketing features to:

- Define your company’s marketing strategy
- Create marketing plans and collateral
- Define pricing and budgets
- Identify customer segments
- Execute campaigns across multiple channels

Integration across marketing, planning, pricing, campaign development and execution, and lead management enables marketing effectiveness, intelligence, and performance analysis. You can effectively close the loop in your marketing campaigns.

Before you begin, use the Getting Started page in the Setup and Maintenance work area to access reports for each offering, including full lists of setup tasks, descriptions of the options and features you can select when you configure the offering, and lists of business objects and enterprise applications associated with the offering.

The first implementation step is to configure the offerings in the Setup and Maintenance work area by selecting the offerings and options that you want to make available to implement. For the Marketing offering, you can select the following options:

- E-Mail Server for Marketing
- Lead Management
- Segmentation Server for Marketing
- Marketing Business Intelligence Analytics

Next, create one or more implementation projects for the offerings and options that you want to implement first, which generates task lists for each project. The application implementation manager can customize the task list and assign and track each task.

If you select all of the options, the generated task list for this offering contains the following groups of tasks:

- Define Common Applications Configuration
- Define Common CRM Configuration
- Define Territory Management Configuration
- Define Lead Management
- Define Common Marketing Configuration
- Define Campaign Fulfillment System
- Define E-Mail Server
- Define Segmentation Manager
- Define Transactional Business Intelligence Configuration
- Define Extensions for Marketing
Define Common Applications Configuration

Use this task list to manage definitions used across offerings, typically applying to multiple products and product families. These definitions include enterprise structures, workforce profiles, security, and approval rules, among others.

Define Common CRM Configuration

Use this task list to define and manage the setup for common options within the Customer Relationship Management (CRM) set of business processes.

Define Territory Management Configuration

Use this task list to define and manage the attributes, attribute values, metrics, policies, and measure information that is related to territory management.

Define Lead Management

Use this task list to define and manage the setup to support sale leads creation and follow-up functions.

Define Common Marketing Configuration

Use this task list to define and manage the setup for common functions within the marketing business process.

Define Campaign Fulfillment System

Use this task list to create and manage marketing suppliers, such as call centers and fulfillment companies, that provide campaign distribution services.

Define E-Mail Server

Use this task list to install and manage e-mail server configuration changes. The e-mail server provides the e-mail sending daemon that delivers e-mail, and the click-through daemon that tracks e-mail recipient responses.

Define Segmentation Manager

Use this task list to define and manage Segmentation configuration, such as list formats, merge fields, and configuration parameters.
Define Transactional Business Intelligence Configuration

Use this task list to configure Oracle Transactional Business Intelligence for ad hoc reporting, including managing the repository, connections, presentation catalog, and currency type display.

Define Extensions for Marketing

Use this task list to define extensions such as custom Oracle Enterprise Scheduler jobs.

You can also customize and extend applications using other tools. For more information, see the Sales Cloud Customizing Sales Guide.

Accessing Marketing Setup Tasks: Overview

For most Oracle Sales Cloud setup tasks, use the Setup and Maintenance work area to access the setup pages associated with the component or feature. The Setup and Maintenance work area is also known as the Functional Setup Manager.

Use the following procedure to access setup tasks:

1. Sign in as a user with access to the setup areas, such as the initial user, another setup user, or the sales administrator.
   
   For Oracle Sales Cloud activities, a user with the Sales Administrator role performs many, if not most, of the setup and configuration tasks. For more information on typical sales administrator tasks, see the topic, About the Sales Administrator.

2. Navigate to the Setup and Maintenance work area.

   Tip: You can use the navigator menu or the menu underneath your user name in the global area.

3. Search for the task you need to use.

4. In the list of tasks that appears, find the task you want and select it.
   
   The setup page for the task appears.

Downloading Task Lists and Setup Reports

You may also want to download lists of tasks and task lists and other documents related to the Marketing offering. Use the following procedure:

1. Sign in as a user with access to the setup areas, such as the initial user, another setup user, or the sales administrator.

2. From the Getting Started page, click the Marketing offering icon to access reports for Marketing.

   The reports include full lists of setup tasks, descriptions of the options and features you can select when you configure the offering. You can also view lists of business objects and enterprise applications associated with the Marketing offering.
3. View the reports in various formats, such as .pdf, html, and .xls. Use the reports to guide you in your setup activities.
4. When you are ready to start implementing a feature or functionality, you can optionally create one or more implementation projects for the offerings and options that you want to implement. For more information on creating implementation projects, see the help, using keywords "implementation project".

For more information on the Functional Setup Manager, see the Oracle Applications Cloud - Using Functional Setup Manager guide.

Related Topics
- About the Sales Administrator
- Oracle Applications Cloud - Using Functional Setup Manager

Understanding Implementation Structures

Offerings: Explained

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

Offering Related Documents: Explained

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

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

Setup Task Lists and Tasks Report
This report shows the list of task lists and tasks that you should complete to successfully implement the offering.

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

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

Related Enterprise Applications Report
This report shows the list of enterprise applications used by the functional pages and web services for the offering.
Features: Explained

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

Feature choices can be one of three different types:

Yes or No
If a feature can either be applicable or not be applicable to an implementation, a single check box is presented for selection. Check or deselect to specify yes or no respectively.

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

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

Implementation Task Lists: Explained

The configuration of the offerings determine how the list of setup tasks is generated during the implementation phase. Only the setup tasks needed to implement the selected offerings, functional areas and features are included in the task list. This gives you the targeted task list necessary to meet your implementation requirements.

Managing an Implementation

Enabling Offerings: Explained

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

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

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

Enabling Offerings: Procedure

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

Enabling Offerings

To enable offerings, follow these steps.

1. Open the Setup and Maintenance work area (Navigator > Setup and Maintenance).
2. In the Setup and Maintenance Offerings page, select the offering you’re using, then click Configure.
3. In the Configure page, select the Enable check box for the offering. Also select the Enable check box for each of the functional areas you want to use.
4. Click the Features icon for the offering or functional area you have enabled, then enable any features you require. Select Done when complete.
5. Select Done to return to the Offerings page then repeat the same steps for each of the offerings you are using.

Implementing Offerings: Explained

Once you have configured the offering you want to implement, you can start performing the appropriate task to setting your applications up to support your business processes. Functional Setup Manager provides two methods to set up the offerings and therefore applications depending on your business needs.

Offering based implementation

Following a predefined list of tasks required for the features you selected to implement. This method enables you to implement the functionality on an adopt-as-you-go based approach. It provides you direct access to the setup tasks saving you time as by default gives you visibility to the minimum requirements for your implementation. This is always the recommended method to implement your applications unless you require custom implementation task lists.

Project based implementation

Enables you to customize your implementation defining an implementation project with a tailored list of tasks, task assignment and implementation progress monitoring. Use of this method is recommended when you require a custom task list.

Offering Based Implementation: Explained

You can use the Setup and Maintenance work area to directly implement an entire offering or functional areas within an offering. You do not need to create an implementation project, and instead use a modular approach to your implementation.
You can complete setup of specific business areas quickly to start transactions, and then gradually adopt more and more application functionality as needed.

An offering or functional area-based approach means you set up various parts of an offering at different times. You can start with set up of the functional areas that you immediately need to adopt. Over time, you can continue to set up other functional areas as you start to adopt additional applications functionality. Offerings must be enabled for implementation in order for their functional areas to display. Offering or functional area-based implementation provides the following advantages:

- When you select an offering the relevant functional areas appear for selection. The common functional areas are those shared across offerings and are listed first. The functional areas that are only associated with the selected offering, are at the bottom of the list.
- A functional area usually has several setup tasks, but only a few of them require input before the application function is ready for transactions. The rest of the setup tasks are usually optional or have predefined default values based on common use cases. When you select a functional area for implementation, you can view just the required tasks, or you can view the full list of setup tasks for the functional area.

Executing Setup Tasks

You select the functional area you want to implement and the list of tasks that you need to perform appears. The tasks are organized with prerequisites and dependencies in mind. Select the task for which you want to enter data and then click Go to Task to render the page where you perform the task. If the setup data entered through a task can be segmented by a specific attribute, and therefore could be performed iteratively for each qualifying value, then the task may benefit from scope. Typical examples include tasks relevant to legal entities, business units, ledgers, tax regimes, and legislative data roles. For such tasks, you are prompted to pick a scope value before entering data. You can pick a scope value that was previously selected, select a new scope value, or create a new scope value and then select it. The selected value is a qualifying attribute of the setup data entered by way of the task, and therefore, different setup data can be entered for different scope values. Enter data as appropriate and once you finish, close the page and you return to the functional area list of tasks.

Note: You cannot perform a task if you do not have the proper security entitlement.

Project Based Implementation: Explained

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

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

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

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

Selecting Offerings

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

Migrating Data Between Environments: Points to Consider

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

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

Related Topics

- Oracle Applications Cloud Using Functional Setup Manager
- Performing Offering-based Export
- Performing Offering-based Import
4 Using Profile Options, Lookups, and Scheduled Processes

Profile Options, Lookups, and Scheduled Processes: Overview

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

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

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

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

Profile Options

Profile Options: Explained

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

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

<table>
<thead>
<tr>
<th>Type of Information</th>
<th>Profile Option Setting Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>User preferences</td>
<td>Provides access to social networking features</td>
</tr>
<tr>
<td>Installation information</td>
<td>Identifies the location of a portal</td>
</tr>
<tr>
<td>Configuration choices</td>
<td>Changes UI skins and behaviors</td>
</tr>
<tr>
<td>Processing options</td>
<td>Determines how much information to log</td>
</tr>
</tbody>
</table>
Profile Option Hierarchy Levels

Profile options can be set at different levels, such as site level or user level. The application gives precedence to certain levels over others, when multiple levels are set. The allowed levels come preconfigured with the application.

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

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

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

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

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

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

**Related Topics**
- Profile Options and Related General Preferences: How They Work Together
- Profile Options: Overview

How can I access predefined profile options?

Search for predefined profile options using the Define Profiles task list:

1. In the Setup and Maintenance work area, search for the **Manage Profile Options** task and open it.
2. Enter any of the search parameters and click **Search**.

**Tip**: If you don’t know the profile option code or the display name, use the Application or Module fields to filter search results.

3. Click a profile option to view its details.
Importing Profile Values: Procedure

Use the Import option on the Manage Administrator Profile Values page to import profile values in bulk and associate them with a profile option.

Prerequisite
The file containing the profile values is available in the document repository of Oracle WebCenter Content.

Importing Profile Values
To import profile values:

1. Sign in to the application as an implementation consultant or an administrator.
2. In the Setup and Maintenance work area, search for and open the Manage Administrator Profile Values task or a similar task used for importing profile values.
3. In the Profile Option: Profile Values section, from the Actions menu, select Import.
4. On the Import User Profile Values dialog box, select the WebCenter Content account to which the file was uploaded.
5. Enter the name of the file containing the profile values. The name here must match with the name of the file uploaded to the selected account.
6. Click Upload. The profile values are imported.

⚠️ Note: If the import fails, click the link to the log file on the confirmation dialog box and examine the cause of failure.

Related Topics
- Importing Flexfields, Lookups, or Profile Values Using Web Services: Example

File Format for Importing Profile Values: Explained

To import profile option values into the application, you create a text file with the values and upload the file to the Oracle WebCenter Content document repository. The file must follow a specific format, as described here. After the file is in the document repository, you can then import the profile values into the application following the instructions in the Importing Profile Option Values: Procedure topic.

To create a file containing the profile values, include the following headers:

- **ProfileOptionCode**: The profile option code.
- **LevelName**: Must contain the value (Site, Product, or User).
- **UserName**: Must correspond to the registered user name in the application. Don’t provide any other shortened or coded name of the user.
- **ProfileOptionValue**: The profile value to be imported.

While creating the file, adhere to the following guidelines:

- Use a vertical bar or pipe (|) as a delimiter between fields for both header and value rows.
- Set the file encoding to UTF-8 without the Byte Order Mark (BOM), as per the Oracle WebCenter Content specification.
Here’s a sample file that contains the header values at the top and lists two profile values to be imported. For importing several profile values, add more entries in the same format.

```
ProfileOptionCode|LevelName|UserName|ProfileOptionValue
AFLOG_BUFFER_MODE|USER|APP_IMPL_CONSULTANT|TEST
AFLOG_LEVEL|USER|APPLICATION_DEVELOPER|FINEST
```

Related Topics
- Files for Import and Export: Explained
- Files for Import and Export: Points to Consider
- Uploading Files to WebCenter Content Server: Procedure
- Profile Options: Overview

## Lookup Types

### Lookup Types: Explained

Lookup types in Oracle Sales Cloud provide the lists of values in application fields that are drop-down lists. For example, when closing an opportunity, salespeople can pick a reason that an opportunity was won or lost from the Win/Loss Reason field, which is a drop-down list. The values in that list are derived from the lookup type, MOO_WIN_LOSS_REASON, which has several potential values known as lookups, each with its own unique lookup code and a meaning that displays in the UI.

### Customizing Lookup Types

You can customize many lookup types during or after implementation. The customization level of a lookup type determines whether the lookups in that lookup type can be edited. The customization levels are: User, Extensible, and System.

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

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

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

Sales Cloud Lookup Types

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

- Define Opportunity Management Lookups
- Manage Contact Lookups
- Manage Customer Account Lookups
- Manage Customer Center Lookups
- Manage Partner Lookups
- Quota Management Lookups

You can find many other Sales Cloud lookups in the Manage Standard Lookups task.

To access Sales Cloud lookup types:

1. Sign in to the application as the sales administrator or a setup user.
2. Navigate to Setup and Maintenance.
3. Search for and select the task or task list for the lookups you want to find. For example, you can search on the word lookups to find all tasks or task lists containing that word. Or, if you know the name of the lookups task or task list, you can search for it directly. For example, you can search for Define Opportunity Management Lookups.
4. After you're in the lookup types page, in the search utility, search for a lookup type. For example, in the Lookup Type field, enter COMMUNICATION_TYPE.

Set-Enabled Lookup Types

Several applications support lookup types at the reference set level, allowing you to present different lists of values for different business units. You can find these in the Manage Set Enabled Lookups task.

Related Topics

- Reference Data Sets: Explained

How can I access predefined lookups?

Search for predefined lookups using the Define Lookups task list:

1. In the Setup and Maintenance work area, search for the Define Lookups task list and expand it to view the tasks.
2. Open the task that corresponds to the lookups you are searching for.
3. Enter any of the search parameters and click **Search**. If you don't know the lookup type or the meaning, use the **Module** field to filter search results.

4. Click a lookup type to view its lookup codes.

**Tip:** Click the Query By Example icon to filter the lookup codes.

**Related Topics**
- Using Query By Example: Procedure

---

**How can I edit lookups?**

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

The task list contains three tasks:
- Standard Lookups
- Common Lookups
- Set-enabled Lookups

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

---

**Why can't I see my lookup types?**

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

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

---

**Importing Lookups: Procedure**

On each page pertaining to the tasks of managing the Standard, Common, and Set Enabled lookups, use the Import option to import the lookup type and lookup code information.

**Prerequisite**

The separate files containing the lookup types and lookup codes are already available in the document repository of Oracle WebCenter Content.

**Importing Lookups**

To import lookups:

1. Sign in to the application as an implementation consultant or an administrator.
2. In the Setup and Maintenance work area, search for and open a relevant lookups task list or task that you can use to import lookups.

3. Under Search Results, from the Actions menu, select Import. The Import Lookups dialog box appears.

4. Select the WebCenter Content account to which the files were uploaded.

5. Enter the names of the separate files containing the lookup type and lookup code information. The names here must match with the names of the files uploaded to the selected account.

6. Click Upload. The lookup details are imported.

**Note:** If the import fails, click the link to the log file on the confirmation dialog box and examine the cause of failure.

**Related Topics**
- Importing Flexfields, Lookups, or Profile Values Using Web Services: Example

### File Format for Importing Lookups: Explained

To import lookups into an application, you create separate text files containing the lookup types and lookup codes and upload them to the Oracle WebCenter Content document repository. The files must follow a specific format, as described here. After the files are in the document repository, you can then import the lookup types and lookup codes into the application following the instructions in the Importing Lookups: Procedure topic.

While creating the file, adhere to the following guidelines:

- Use a vertical bar or pipe (|) as a delimiter between fields for both header and value rows.
- Set the file encoding to UTF-8 without the Byte Order Mark (BOM), as per the Oracle WebCenter Content specification.

The following sections contain details about the specific lookup types and codes.

**Prerequisite**

You must have worked with lookups in Oracle Cloud applications.

**Standard and Common Lookups**

The lookup types and codes are similar for standard and common lookups. To create a file containing the lookup types, include the following headers:

- **LookupType**: The lookup type.
- **Meaning**: The display name of the lookup type.
- **Description**: The description of the lookup type. This header is optional.
- **ModuleType**: The module with which the lookup type is associated.
- **ModuleKey**: The module code.

Here’s a sample file that contains the header values at the top and lists two lookup types to be imported. For importing several lookup types, add more entries in the same format.

```
LookupType|Meaning|Description|ModuleType|ModuleKey
```
To create a file containing the lookup codes, include the following headers.

- Required headers:
  - **LookupType**: The lookup type.
  - **LookupCode**: The lookup code associated with the lookup type.
  - **DisplaySequence**: The sequence position at which the lookup code appears in the list of values.
  - **EnabledFlag**: Indicates the status of the lookup code, whether it’s enabled for display or not.
  - **Meaning**: The display name of the lookup code.

- Optional headers:
  - **StartDateActive**: Beginning of the date range during which the lookup code is active and visible on the page.
  - **EndDateActive**: End of the date range during which the lookup code is active and visible on the page.
  - **Description**: Description of the lookup code.
  - **Tag**: Any tag associated with the lookup code that may be used for a quick reference or retrieval of information.

Here’s a sample file that contains two lookup codes:

```
LookupType|LookupCode|DisplaySequence|EnabledFlag|StartDateActive|EndDateActive|Meaning|Description|Tag
-------------------------------------------------------------
TASK_22APR_1|Code1_1|1|Y|11/12/2014|1/5/2015|TASK_22apr_1|Task_desc_1|Tag1_1
TASK_22APR_1|Code1_2|2|N|1/1/2014|1/11/2015|TASK_22apr_2|Task_desc_2|Tag1_2
TASK_22APR_2|code2_1|3|N|11/12/2012|1/7/2015|TASK_22qpr_2_1|Task_desc_2|tag2_1
TASK_22APR_2|code2_2|3|Y|11/12/2012|1/7/2015|TASK_22qpr_2_2|Task_desc_2|tag2_2
```

### Set Enabled Lookups

To create a file containing the set enabled lookup types, include the following headers:

- **LookupType**: The lookup type.
- **Meaning**: The display name of the lookup type. This header is optional.
- **Description**: The description of the lookup type.
- **ModuleType**: The module with which the lookup type is associated.
- **ModuleKey**: The module code.
- **ReferenceGroupName**: Name of the reference group that contains the reference data set.

Here’s a sample that contains two set enabled lookup types:

```
LookupType|Meaning|Description|ModuleType|ModuleKey|ReferenceGroupName
-------------------------------------------------------------
CODE_22APR_1|CODE_22apr_1|Code_desc_1|APPLICATION|FND|BU_APAC
CODE_22APR_2|CODE_22apr_2|Code_desc_2|APPLICATION|FND|BU_APAC
```

To create a file containing the set enabled lookup codes, include the following headers.

- Required headers:
  - **LookupType**: The lookup type.
  - **LookupCode**: The lookup code associated with the lookup type.
  - **DisplaySequence**: The sequence position at which the lookup code appears in the list of values.
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- **EnabledFlag**: Indicates the status of the lookup code, whether it’s enabled for display or not.
- **Meaning**: The display name of the lookup code.
- **SetName**: Name of the reference data set.

**Optional headers:**

- **StartDateActive**: Beginning of the date range during which the lookup code is active and visible on the page.
- **EndDateActive**: End of the date range during which the lookup code is active and visible on the page.
- **Description**: Description of the lookup code.
- **Tag**: Any tag associated with the lookup code that may be used for a quick reference or retrieval of information.

Here’s a sample file that contains the header values at the top and lists four set enabled lookup codes to be imported. For importing several lookup codes, add more entries in the same format.

<table>
<thead>
<tr>
<th>LookupType</th>
<th>LookupCode</th>
<th>DisplaySequence</th>
<th>EnabledFlag</th>
<th>StartDateActive</th>
<th>EndDateActive</th>
<th>Meaning</th>
<th>Description</th>
<th>Tag</th>
<th>SetName</th>
</tr>
</thead>
<tbody>
<tr>
<td>DATA_22APR_1</td>
<td>Code1_1</td>
<td>1</td>
<td>Y</td>
<td>11/12/2014</td>
<td>1/5/2015</td>
<td>DATA_22apr_1</td>
<td>Data_desc_1</td>
<td>Tag1_1</td>
<td>TEST SET CODE 2</td>
</tr>
<tr>
<td>DATA_22APR_1</td>
<td>Code1_2</td>
<td>2</td>
<td>N</td>
<td>1/1/2014</td>
<td>1/11/2015</td>
<td>DATA_22apr_2</td>
<td>Data_desc_2</td>
<td>Tag1_2</td>
<td>TEST SET CODE 3</td>
</tr>
<tr>
<td>DATA_22APR_2</td>
<td>code2_1</td>
<td>3</td>
<td>N</td>
<td>11/12/2012</td>
<td>1/7/2015</td>
<td>DATA_22qpr_2_1</td>
<td>Data_desc_2_1</td>
<td>tag2_1</td>
<td>TEST SET CODE 2</td>
</tr>
<tr>
<td>DATA_22APR_2</td>
<td>code2_2</td>
<td>3</td>
<td>Y</td>
<td>11/12/2012</td>
<td>1/7/2015</td>
<td>DATA_22qpr_2_2</td>
<td>Data_desc_2_2</td>
<td>tag2_2</td>
<td>TEST SET_ERR_CODE_Z</td>
</tr>
</tbody>
</table>

**Related Topics**

- Files for Import and Export: Explained
- Files for Import and Export: Points to Consider
- Uploading Files to WebCenter Content Server: Procedure
- Lookups: Explained

### Scheduled Processes

#### Scheduled Processes: Explained

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

**Report Output**

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

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

**Parameters**

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

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

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

Process Sets

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

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

Related Topics

• Process Sets: Explained
• Submitting Scheduled Processes and Process Sets: Procedure
• Managing Scheduled Processes That You Submitted: Points to Consider

Viewing Details About Predefined Scheduled Processes: Procedure

To use web services to run predefined scheduled processes, you need details about the processes. View job definitions that the processes are based on, for example to get information about parameters. You might also need to find security requirements for running the scheduled process.

Job Definitions

A job definition contains the metadata that determines how a scheduled process works and what options are available during submission.

To view job definitions:

1. Go to the Setup and Maintenance work area.
2. Run a search with Manage Custom Enterprise Scheduler Jobs as the search term.
3. In the search results, open the Manage Custom Enterprise Scheduler Jobs task for the application that contains the job definition. Tasks with names that end in and Related Applications include multiple applications.
4. In the Manage Job Definitions tab, select your job definition and click Edit.

Note: Predefined job definitions are marked with an asterisk.
5. Cancel after you get the information you need.

Security

Privileges provide the access needed to run specific scheduled processes. Privileges are granted to duty roles, which are granted to job roles. To see which job roles inherit the needed privileges, use the Security Console or the security reference manuals for the appropriate product family.
Related Topics

- How can I see which applications a Manage Custom Enterprise Scheduler Jobs task includes?
5 Setting Up Users and Security

Defining Security: Overview

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

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

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

Manage Job Roles Task

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

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

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

Manage Duties Task

You perform the Manage Duties task to:

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

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

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

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

Manage Users Task

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

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

Manage HCM Role Provisioning Rules Task

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

**Related Topics**

- Oracle Help Center guides

Defining Setup Users: Overview

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

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

- Oracle Help Center guides

Using Test E-Mail Accounts During User Setup

During an implementation, you may set up users, enter contact information, and test business flows that trigger automatic e-mails. During this stage of your implementation, you may want to prevent e-mail from being sent to real people. This topic details the best way to prevent sending e-mail to real people, using discard e-mail domains that Oracle has made available for this purpose.

As you implement Oracle cloud applications, you may want to set up users (such as sales representatives or employees) and contacts (such as customers or household members) in your system to model the organizations with which you work and to test your business flows. E-mail address is an attribute of these user and contact records, and Oracle cloud applications will automatically send e-mail to these users and contacts as you test your business processes. Examples of these business processes include user activation, sales campaigns, and appointment invitations.

Established Discard E-Mail Domains

An improper way to suppress the e-mails is to use fictitious e-mail addresses because this causes e-mail bounces. Fictitious e-mails generally take three forms:

- An incorrect user identifier at a valid domain
- A random domain
- A domain that does not exist

Using fictitious e-mail addresses can have numerous unintended consequences, including unintentionally sending e-mail to a real person or damaging the reputation of the IP address that sends out the e-mail, potentially flagging it as a sender of spam. For example, you might send an e-mail to tina.best@ssf.com, thinking that ssf is just a random alphabetic sequence and not an actual domain. However, your e-mail is actually sent to the Spruce Street Foods (ssf.com). The Spruce Street Foods e-mail server must then determine if there is a valid recipient and, if not, make a reputation decision about the sender’s IP address.

To avoid the use of the above-mentioned conditions, Oracle cloud applications have established e-mail domains in each of its data centers that you can use temporarily during setup. Any e-mail sent from Oracle cloud applications to one of the discard domains will not leave the data center. Instead, it will be discarded by the mail servers during the send process. You can turn any recipient address into a discard address by replacing the domain information with one of the discard domains. So, in our example above, we might use tina.best@discard.mail.us1.cloud.oracle.com.

The following table shows the available discard domains and the data centers that they are associated with.

<table>
<thead>
<tr>
<th>Discard Domain</th>
<th>Data Center</th>
</tr>
</thead>
<tbody>
<tr>
<td>@discard.mail.us1.cloud.oracle.com</td>
<td>Austin</td>
</tr>
<tr>
<td>@discard.mail.us2.cloud.oracle.com</td>
<td>Chicago</td>
</tr>
<tr>
<td>@discard.mail.us6.cloud.oracle.com</td>
<td>Ashburn</td>
</tr>
<tr>
<td>@discard.mail.ca2.cloud.oracle.com</td>
<td>Markham</td>
</tr>
</tbody>
</table>
Discard domains cross data center boundaries. You can use any of them, no matter which data center supplies your service. Oracle provides data center-specific domains in case you are concerned about geopolitical boundaries and want to ensure that discard data remains in your data center region.

Discard domains are also available for government and defense data centers. For details on these restricted data centers, log a service request for cloud operations through My Oracle Support.

If you are importing your users, you can use the discard domains in your import file and then go back later and re-import the users with the real domain information. For more information on importing users, see the importing users topics in the Oracle Sales Cloud Getting Started with Your Implementation guide.

### About Sales Resources

Sales users who access the applications to participate in transactional activities such as managing opportunities and leads, are known as sales resources. During implementation, you create sales resources and build your resource organization at the same time. After implementation, you maintain sales resources, such as by modifying their organization assignments, adding or removing permissions, creating additional users, and so on.

You can create users directly in the user interface or you can import them from a file.

For more information about creating and maintaining users, see the following guides:

- Oracle Sales Cloud Getting Started with Your Implementation
- Securing Oracle Sales Cloud

These guides are available on Oracle Help Center.
Additional Capabilities for Sales Resources

The following functionality also is available for sales resources:

- **Proxy users**: Sales resources can designate another resource as a proxy to sign in to the applications and perform tasks on their behalf. Proxy users are helpful when a resource can’t perform the tasks in person during a specific period. For more information, see the topic, Proxies: Explained.

- **Restricted users**: Some sales resources may need access to transactional data, but do not need to modify that data. You can create restricted sales resources who can view sales data, but cannot change data. For more information, see these topics: Sales Restricted Users: Explained and Creating Sales Restricted Users.

- **Records transfer**: When necessary, you can move records, such as opportunities or leads, from one sales resource to another using the Mass Transfer feature. For more information, see the these topics: Transferring Records Between Users: Explained and Transferring Records Between Users: Procedure.

**Related Topics**

- Oracle Help Center
- About Oracle Sales Cloud Users: Explained
- Proxies: Explained

About the Sales Administrator

The sales administrator user performs most setup tasks related to sales-force automation in Oracle Sales Cloud.

Although he does not participate directly in the sales process, the sales administrator user is created as an organization resource and employee in the organization hierarchy. For steps detailing how to create the sales administrator user, see the Oracle Sales Cloud Getting Started with Your Implementation guide.

The following are the tasks the sales administrator user typically performs:

- Download task lists and setup reports.
- Set sales profile options.
- Configure extensible lookups for sales.
- Run most of the scheduled processes for sales.
- Set up the sales calendar.
- Set up accounts and contacts options.
- Manage global search options.
- Function as a centralized territory administrator.
- Configure opportunities.
- Configure forecast criteria.
- Administer sales quotas.
- Configure work assignment.
- Manage price books.
Create and manage sales products and promotions.
Set up and administer the sales catalog.
Configure Oracle Social Network.
Set up mobile applications.
Set up partner functionality.
Perform customization tasks.
Perform file-based data import.

Note: The sales administrator does not have the same setup permissions as a setup user. He has permissions required to set up and administer sales features and components, but not the higher-level permissions required to implement enterprise and security features. For more information, see the Securing Oracle Sales Cloud guide and the Oracle Sales Cloud Security Reference guide.

Related Topics
- Oracle Help Center

Records Transfer Between Users

Transferring Records Between Users: Explained
Mass Transfer of records lets you move records from one user to other. A record owner or any user above the owner in the role or territory hierarchy can transfer records from one user to the other. Before transferring records, you must understand:

- Record Types
- Record Filters
- Record Transfer Status

Record Types
Record types are broad categories of objects or information related to a user. For example, Deal Registrations associated with a user. Currently, you can mass transfer Leads, Opportunities, and Deal Registrations that belong to a user.

Record Filters
Record Filters let you refine the list of records associated with the user for a record type. For example, you can transfer only deal registrations that were created during a time period. You can't specify filters for all record type. The Transfer Records: Define Filters page lets you view the record types that allow filtering, and specify the record filters.

Record Transfer Status
Record transfer statuses appear in the Mass Transfer Status page and show the status of transfer jobs. The Mass Transfer processes records to ensure data integrity before transferring the records from a user to the other.
A Record Transfer job can have one of these statuses:

- In Progress: Transfer job is currently in process.
- Completed: Transfer job has been completed without errors.
- Errors: Transfer job has resulted in an error.

You can click on the transfer job name to view the record types that were transferred, the status of each record type, and the log file associated with a record type.

Transferring Records Between Users: Procedure

This procedure describes how you can transfer records from one user to the other using the Mass Transfer tool.

To transfer records from one user to another:

1. Navigate to Mass Transfer from the Tools menu.
2. In the Mass Transfer Status page, click Transfer Records.
3. In the Transfer Records: Select Owners and Records page, search for the current owner and the new owner of the records. For example, if you are transferring from Adam Smith to Samantha Hayes, then you must select Adam Smith as the current owner and Samantha Hayes as the new owner.
4. Select the types of records you want to transfer. For example, if you are transferring opportunities and leads, then you must select Opportunities and Sales Leads.

   The Transfer Details column lists the types of records that will be transferred.

5. Click Next.

   In the Transfer Records: Define Filters page, you specify filters for record types you have selected. For example, you can specify the start and close dates for opportunities to transfer the opportunities that were closed during a specified period of time.

6. Select a record type to view the filters available, and specify the filters.
7. Click Submit.
8. Click Yes in the confirmation dialog box.

The Mass Transfer Status page lists the recent mass transfer jobs and their statuses.
6 Setting Up Common Components

Setting Up Common Components: Overview

Several common components provide core functionality for the cloud service. Common components provide functionality that spans multiple modules or products, such as the accounting calendar or application messages. This chapter describes many of the common components. Where appropriate, other common components have their own individual chapters or are described in other guides or help topics.

Related Topics
- Oracle Applications Help
- Oracle Help Center

Activities

Setting Up Activity Notification: Explained

This topic includes configuration information for activity notification.

Notification Configuration

Two levels of configuration determine who will receive notifications:

- Company level
- User level

At the company level, administrators control whether:

- Task notifications are sent to contacts (ZMM_ACTIVITY_TASKS_EXTERNAL_NOTIFICATION).
- Appointment notifications are sent to contacts (ZMM_ACTIVITY_EXTERNAL_NOTIFICATION).
- An iCal is sent with e-mail notifications of appointments (ZMM_ACTIVITY_ICAL_IN_NOTIFICATION).
- Appointment e-mail notification is disabled for the entire company (ZMM_ACTIVITY_DISABLE_EMAIL_APPT_NOTIF).
- Task e-mail notification is disabled for the entire company (ZMM_ACTIVITY_DISABLE_EMAIL_TASK_NOTIF).
- Task notification in the notification list is disabled for the entire company (ZMM_ACTIVITY_DISABLE_LIST_TASK_NOTIF).
- Appointment notification in the notification list is disabled for the entire company (ZMM_ACTIVITY_DISABLE_LIST_APPT_NOTIF).

At the user level, you can set personal notification preferences using the Calendar and Activity preferences page (Personalization, Set Preferences, Calendar and Activity).
Note that if the administrator has turned on e-mail notification at the company level, each individual user can still choose not to receive e-mail notifications. If the administrator has turned on notification in the notification list, each individual user can still choose not to receive notifications in the notification list.

You can receive notification if others make changes, and you can specify whether to:

- Receive notification if you are the owner.
- Receive notification if you are a resource (not the owner).
- Receive task notification if changes are made to completed tasks.

You can specify the following for both appointments and tasks:

- Whether to receive e-mail notification
- Whether to receive notification messages in the notification list.

The corresponding profile options for user-level controls are:

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZMM_ACTIVITY_APPT_NOTIF_OWNER</td>
<td>Whether to receive appointment notifications if others make changes and you are the owner of the appointment.</td>
</tr>
<tr>
<td>ZMM_ACTIVITY_APPT_NOTIFRESOURCE</td>
<td>Whether to receive appointment notifications if others make changes and you are a resource on the appointment.</td>
</tr>
<tr>
<td>ZMM_ACTIVITY_TASK_NOTIF_OWNER</td>
<td>Whether to receive task notifications if others make changes and you are the owner of the task.</td>
</tr>
<tr>
<td>ZMM_ACTIVITY_TASK_NOTIFRESOURCE</td>
<td>Whether to receive task notifications if others make changes and you are a resource on the task.</td>
</tr>
<tr>
<td>ZMM_ACTIVITY_TASK_NOTIFPAST</td>
<td>Whether to receive task notifications if others make changes for tasks that have already been completed.</td>
</tr>
<tr>
<td>ZMM_ACTIVITY_APPT_NOTIFLIST</td>
<td>Whether to receive appointment notifications in the notification list.</td>
</tr>
<tr>
<td>ZMM_ACTIVITY_APPT_NOTIFEMAIL</td>
<td>Whether to receive appointment notifications by e-mail.</td>
</tr>
<tr>
<td>ZMM_ACTIVITY_TASK_NOTIFLIST</td>
<td>Whether to receive task notifications in the notification list.</td>
</tr>
<tr>
<td>ZMM_ACTIVITY_TASK_NOTIFEMAIL</td>
<td>Whether to receive task notifications by e-mail.</td>
</tr>
<tr>
<td>ZMM_ACTIVITY_EMAILREMINDER</td>
<td>Whether to receive appointment e-mail reminders.</td>
</tr>
<tr>
<td>ZMM_ACTIVITY_NOTIFICATION_LISTREMINDER</td>
<td>Whether to receive appointment reminders in the notification list.</td>
</tr>
<tr>
<td>ZMM_ACTIVITY_TASK_NOTIFOWNERINITIATED</td>
<td>Whether to receive task notifications when you make changes and you are the owner of the task.</td>
</tr>
</tbody>
</table>
### Turning Off Notification for the Entire Company

You can turn off activity notification globally, meaning that no one in the company will receive notifications. To do this:

1. Sign in as the sales administrator or as a setup user.
2. Navigate to the Setup and Maintenance work area.
3. Search for and select the task, Manage Activity Profile Options.
4. Click the appropriate profile option to disable e-mail or appointment notification, as shown in the following table.

<table>
<thead>
<tr>
<th>Option to Disable</th>
<th>Profile Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appointment e-mail notification to entire company</td>
<td>ZMM_ACTIVITY_DISABLE_EMAIL_APPT_NOTIF</td>
</tr>
<tr>
<td>Task e-mail notification to entire company</td>
<td>ZMM_ACTIVITY_DISABLE_EMAIL_TASK_NOTIF</td>
</tr>
<tr>
<td>Appointment notification in the notification list for the entire company</td>
<td>ZMM_ACTIVITY_DISABLE_LIST_APPT_NOTIF</td>
</tr>
<tr>
<td>Task notification in the notification list for the entire company</td>
<td>ZMM_ACTIVITY_DISABLE_LIST_TASK_NOTIF</td>
</tr>
</tbody>
</table>

5. For each profile option you choose to disable, change the site-level profile value to Yes.

### Setting Up Call Reports: Points to Consider

A call report is a central place for salespeople to capture what happened in a sales activity, make related changes, and track key updates.

To set up call reports for your application, consider the following points:

- You must set up Oracle Social Network if you want salespeople to be able to share call reports using the social network tool.
- You can modify lookup types and profile options related to call reports.
- You can customize call reports using Oracle Application Composer, to suit the requirement of your organization.

### Modifying Activity Objectives and Outcomes

Call reports record a snapshot of the outcome of the sales activity and key changes, including summaries, meeting minutes, complete objectives, attendees, attachments, notes, and so forth. You can use the Manage Activity Standard Lookups task in the Setup and Maintenance work area to update or modify the information for activity objectives and outcomes.
The following table shows the lookup types you can modify for objectives and outcomes.

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Display Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORA_ZMM_ACTIVITY_OBJECTIVE</td>
<td>Activity Objective</td>
<td>Purpose of the sales activity. For example, demo of a product, discuss a proposal.</td>
</tr>
<tr>
<td>ZMM_ACTIVITY_OUTCOME</td>
<td>Activity Outcome</td>
<td>Results of the customer activity. For example, call answered, captured issue.</td>
</tr>
</tbody>
</table>

**Setting Call Reports to Read-Only**

Use the Submit Call Report Action Enabled (ZMM_ACTIVITY_ENABLE_SUBMIT_CALL_REPORT) profile option to enable submission of call reports. The options are as follows:

- **Yes**: The Submit button is enabled on the Create Call Report page. When you click Submit, the call report is set to read-only, and you cannot modify the call report.
- **No**: The Submit button is not displayed on the Create Call Report page. This is the default value.

Access the profile option from the Manage Administrator Profile Values task in the Setup and Maintenance work area.

**Related Topics**

- **Call Reports: Explained**

**Changing Activity Calendar Colors: Worked Example**

You can change the color of various items on the calendar.

You can use any standard HTML color codes. You can find color codes in many places on the internet (for example, http://html-color-codes.info/). If you don’t specify a color, the default is gray.

**Changing the Color of Calendar Items**

1. Sign in as a sales administrator or setup user and navigate to **Setup and Maintenance**.
2. Search for and select the **Manage Activity Standard Lookups** task.
3. Select ZMM_ACTIVITY_TYPE (Activity Type Codes).
4. In the **Tag** field, enter an HTML color code in for each item you want to change.
5. Click **Save and Close**.

**Application Toolkit**

**Define Application Toolkit Configuration: Overview**

Oracle Fusion Application Toolkit (ATK) provides many features that are available to users of all product families. These features include Applications Help, the Reports and Analytics pane, and the Watchlist. In the Setup and Maintenance work...
area, use the Define Application Toolkit Configuration task list to set up some of these components. Use the Define Help Configuration task list to set up Applications Help.

Note: The Define Application Toolkit Configuration task list is available in implementation projects only if the Application Toolkit Component Maintenance feature choice is selected.

Tasks
The Define Application Toolkit Configuration task list contains these tasks:

- **Map Reports to Work Areas**: Determine what’s available in the Reports and Analytics pane for specific work areas.
- **Set Watchlist Options**: Define settings that affect what’s displayed in the Watchlist and how often items are refreshed.
- **Manage Application Toolkit Administrator Profile Values**: Set profile options to affect how some Application Toolkit features work.

Related Topics
- Setting Up the Reports and Analytics Pane: Procedure
- Disabling and Enabling Watchlist Categories and Items: Points to Consider
- Setting Up the Mapping Service for Contextual Addresses: Points to Consider
- Setting Up the Worklist Region on My Dashboard: Points to Consider
- Setting Up Help: Overview

Approval Workflows

Approval Management: Highlights
Use approval management to define policies that apply to approval workflows. For example, to reflect your own corporate policies, you can specify levels of approval for expense reports over a particular amount and determine how the approvals are routed.

Approval management:
- Controls workflows for business objects such as expense reports.
- Enables you to define complex, multistage task routing rules.
- Integrates with the setup in Human Capital Management (HCM) to derive approvers based on the supervisory hierarchy.

To define approval management, use the Define Approval Management task list in the Setup and Maintenance work area. The task list includes setup tasks for managing workflow task configurations and approval groups.

Task Configuration
Manage rule sets and rules that control approval flows.
• To configure a predefined approval policy, select the predefined rule set and click the Edit Task icon.
• To disable a predefined rule set, select the Ignore participant check box for that rule set.
• To edit the rules within a predefined rule set, you can insert, update, or delete while in edit mode.
• You can configure a specific rule to automatically approve a task without sending it to any approver.
  ◦ Modify the routing for that rule so that it is sent to the initiator (which means the requestor is the approver).
  ◦ Set the Auto Action Enabled option to True.
  ◦ Enter APPROVE in the Auto Action field.

Approval Groups
Each approval group includes a set of users that you configure to act on tasks in a certain pattern. Tasks can be defined to get routed to an approval group instead of an individual user.
• You can nest approval groups within approval groups.
• You have two options for defining the group:
  ◦ Static: Select the specific users to include in the group.
  ◦ Dynamic: Provide the logic to use to determine the users in the group.

Customization
You can also customize predefined approval workflows, for example to add post-approval activities or additional stages (not available for Oracle Cloud implementations).
• Refer to the Oracle Fusion Applications Extensibility Guide for Developers.

See: Customizing and Extending SOA Components

Attachments

Attachments: Explained
You can use attachments to provide supplementary information to specific business objects. Attachments can be URLs, desktop files, text, or repository folders. For a business object you may view, create, delete, or edit attachments, depending on your role and granted privileges. For more information on attachments, see the Oracle Fusion Applications Developer’s Guide.

Repository
Attachments are stored in a content management repository provided by Oracle WebCenter Content Server. Users managing attachments can’t interact with the repository unless the repository mode is enabled. When enabled, users can share attachments among objects, update attachments, and perform other tasks. Access to the attachment files is controlled by a digital signing mechanism.
Security
Data security applicable to a specific business object extends to its attachments. For example, if a user has no access to a specific expense report, then that user cannot access its attachments. You can also use attachment categories to control access and actions on attachments, based on roles associated with that category. For more information on securing attachments, see the Oracle Fusion Applications Developer’s Guide.

Related Topics
- Attachment Entities: Explained
- What’s an attachment category?

What is the size limit for attachment files in Oracle Sales Cloud?
As delivered, the file size limit for an individual file associated with an attachment in Oracle Sales Cloud is 100 MB. You can decrease this limit, but you can’t increase it. The method for decreasing the limit varies by object.

Sales Cloud objects with a 100 MB limit for each attachment file are:
- Account
- Activity
- Campaign
- Contact
- Forecasting
- Household
- Lead
- Note
- Opportunity
- Partner

Attachments Troubleshooting: Explained
Attachments UIs are very user-friendly and easy to work with. You may encounter issues in certain cases such as you customize the attachments, for example create additional attachment categories, or implement data security on them.

Issue: Can't View, Add, Update, or Delete Attachments
You may encounter the following issues when trying to view attachments or perform actions such as adding attachments.
- You can no longer see specific attachments that were earlier visible.
- You can no longer update or delete attachments.
- You get an error stating that you do not have permission to add attachments.

Resolution
Use the Manage Attachment Entities page to ensure that attachment categories are associated to the relevant attachment entity. You might need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or what categories to assign.
If data security is implemented on the categories for the attachment entity, verify that the Enable Security check box is selected in the Manage Attachment Entities page for that entity. Make sure that users have a role with the privileges shown in the following table, to view, add, update, or delete attachments with a specific attachment category.

<table>
<thead>
<tr>
<th>Action</th>
<th>Privilege</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Read Application Attachment (FND_READ_APPLICATION_ATTACHMENT_DATA)</td>
</tr>
<tr>
<td>Add or Update</td>
<td>Update Application Attachment (FND_UPDATE_APPLICATION_ATTACHMENT_DATA)</td>
</tr>
<tr>
<td>Delete</td>
<td>Delete Application Attachment (FND_DELETE_APPLICATION_ATTACHMENT_DATA)</td>
</tr>
</tbody>
</table>

For example, if users have the Read Application Attachment privilege for all categories associated with the expense report attachment entity, except the Receipts attachment category, then they can view all expense report attachments except those created with the Receipts category. Likewise, if users do not have the Update Application Attachment privilege for any attachment categories tied to the expense report attachment entity, then they cannot create any attachments for the expense reports.

For more information on attachment category data security, see the Oracle Fusion Applications Developer’s Guide.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

**Issue: Missing Attachment Category**

You can view existing attachments but the attachments no longer have an attachment category associated with them.

**Resolution**

When the attachment was added, at least one category existed for the corresponding attachment entity. Since then, the entity was edited so that it no longer has any assigned categories, so the user cannot see the category associated with that attachment.

Use the Manage Attachment Entities page to reassign attachment categories to the relevant attachment entity. For example, if users can no longer see the Receipts attachment category for an attachment to an expense report, then search for the expense report attachment entity and assign to it the Receipts category. You may need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or any additional categories to assign.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

**Related Topics**

- Attachment Entities: Explained
- Attachment Entities and Attachment Categories: How They Work Together
- What’s an attachment category?
Calendar

Creating the Accounting Calendar

The accounting calendar defines the time periods used in the applications. When you create the calendar, you specify the exact dates for each period. These defined periods, often called enterprise periods, are used for many purposes in Oracle Sales Cloud. Examples include:

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

Typically, you create a single accounting calendar as part of your implementation. Setting up your accounting calendar requires the following steps, all of which are covered in this topic:

1. Plan your calendar periods and start year. Refer to the Implementation Considerations section for more information.
2. Create the first-year calendar periods and generate the periods for each additional year. Refer to the Creating the Calendar section for more information.
3. Set the accounting calendar profile option. Refer to the Setting the Calendar Profile Option section for more information.
4. Run a scheduled process. Refer to the Running the Time Dimension Process section for more information.

Note that after your calendar is in use, you cannot change the calendar options. For example, after you’ve generated forecasts, you can’t change the calendar options.

Implementation Considerations

Since you cannot change the calendar after it’s in use, you should plan which periods your calendar will use, and decide which year you want the calendar to start. The period frequency set in your fiscal calendar is the shortest period you can use. Therefore, if you set the period frequency to yearly, then your reports and activities can be for each year, but can’t be broken down by month. If you set the period frequency to monthly, then you can break down activities and reports by month and summarize by quarter and year. However, if you set the period frequency to weekly, then you can perform activities and reports by week, quarter, and year, but not by month because the number of weeks per month varies. In terms of the first year to use for your calendar, consider setting the date to the first date that your company was created. Then you can upload historical data later, if necessary.

Creating the Calendar

When you create the accounting calendar, you are establishing the exact start and end dates for each period, for each year. Use the following procedure:

1. Sign in as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the task, Manage Accounting Calendars task.
3. In the Manage Accounting Calendars page, click Create.
   - The Create Accounting Calendar: Calendar Options page appears.
4. Name your calendar, for example, Sales Calendar.
5. Leave the Adjusting Period Frequency set to None.
6. For Start Date, the fictional company, Vision Corporation, is using 1/1/10.
7. For **Period Frequency**, select the shortest time period you want to use for reports and activities. For Vision Corporation, choose **Monthly**. The period starts on the first of the month and ends on the last day of the month, regardless of the number of days or weeks in each month.

8. For Vision Corporation, choose **None** for the **Separator**.

9. Select the format to use for period names.

10. Click **Next**. The Create Accounting Calendar: Period Details page appears, showing the generated periods, with start and end dates, for the first year (2010 for Vision Corporation). The following figure shows an example of the Create Accounting Calendar: Period Details page.

11. If needed, manually change the details for each period.

12. Click **Save and Close**.

13. Now you need to generate the periods for each additional year, including the current, or coming year. Open the calendar.

14. Click **Add Year**.

15. Click **Save and Close**.

16. Repeat the last three steps for each year you want to add.

17. Click **Done**.

**Note:** You cannot change your calendar options after you start using the calendar, such as by generating forecasts.
Setting the Calendar Profile Option

After your calendar is created, you next set the accounting calendar profile option. This profile option setting tells the applications which calendar to use. Use the following procedure:

1. Sign in as a setup user or the sales administrator and navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Calendar Profile Option task.
3. In the Manage Calendar Profile Option page, select the Accounting Calendar Default profile option.
4. In the Profile Values table, click **New**.
5. For **Profile Value**, select **Site**.
6. Click the **Profile Value** list, and select the name of the calendar you created.
7. Click **Save and Close**.

Running the Time Dimension Process

You must run the Refresh Denormalized Time Dimension Table for BI process to make calendar time periods available for analytics and reports. Use the following procedure.

1. Sign in as a setup user and navigate to **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, click the down-arrow next to the **Name** field and click **Search**.
4. In the Search dialog, enter `%Refresh%`, and click **Search**.
5. Select the **Refresh Denormalized Time Dimension Table for BI** process in the results that are returned and click **Ok**.
6. Click **Ok** again, if needed.

   The Process Details window appears.
7. In the Process Details window, click **Submit**.

Related Topics

- Defining Accounting Calendars: Critical Choices

Click-To-Dial

Oracle Sales Cloud CTI: Highlights

Oracle Sales Cloud Computer Telephony Integration (CTI) integrates with your telephony environment and must be manually enabled in your deployment. This topic highlights what is required to set up the CTI feature and to implement logging of the calls made using the CTI feature.

CTI is a feature of the customer contact process. You initiate phone communication to customers and employees with a click of your mouse, leveraging your customer contact information and the application context. The CTI feature uses Oracle WebLogic Communication Services to enable communications. Applications that provide the CTI functionality do so primarily through contextual actions.

Additionally, CTI utilizes Oracle Sales Cloud tasks as an optional transaction logging feature that will track information about the call such as the customer, call participants, a time stamp noting the start time of the call, the direction of the communication, in or outbound, and the resolution code.
Terms used in setting up these communications include:

- **PSTN**: Public switched telephone network is the network of the world's public circuit-switched telephone networks.
- **SIP**: Session initiation protocol, an open signaling protocol standard that is used to set up phone calls.
- **TPCC**: Third Party Call Control enables an application to control the telephony network to set up calls automatically.
- **Oracle WebLogic Communication Services**: Offers the TPCC service to Oracle applications and sets up the calls using SIP integration with the telephony network.

The setup task list Define WebLogic Communication Services Configuration includes four tasks required for the correct configuration and implementation of CTI. One optional task, separate from the setup task list, is required for implementing task logging.

You can find information about implementing CTI in the Oracle Sales Cloud Administrator’s Guide. Detailed information about configuring and maintaining WebLogic Communication Services is found in the Oracle WebLogic Communication Services Administrator’s Guide.

### Configure and Deploy WebLogic Server

- **Deploy WebLogic Communication Services**: After the Oracle WebLogic communication server is deployed, this manual task activates the server.

  See: Oracle WebLogic Communication Services Administrator’s Guide

### Integrate Communications Services

- **Integrate WebLogic Communication Services with Telephony Network**: This manual task integrates communications within the telephony environment. Oracle WebLogic Communication Services must be configured to interface with the specific characteristics of the telephony network.

  See: Managing Oracle WebLogic Communication Services for CTI Functionality

### Specify the Domain and Address

- **Register a URL for the telephony gateway or soft switch for SIP domain**: This task defines the Server protocol, defaulted to http, the external server host address, and external server port address. The Associated Modules section is not required for setup. You can also perform this as a manual task using Topology Manager to configure the address of the SIP Public Switched Telephone Network (PSTN) gateway or SIP soft switch serving the users within that domain. This address is needed by CTI to correctly form the SIP addresses required by WebLogic Communication Services. See the link to Configuring PSTN Gateway Address Using Topology Manager: Worked Example.

### Enable Click-to-Dial

- After configuring the server and defining the SIP domain, perform the Enable Click-to-Dial task. This task sets the value of the profile option Enable Click-to-Dial to Yes.

### Call Logging Using Tasks

- To initiate the task based logging for CTI, set the profile option Call Interaction Logging Enabled to Yes.
Configuring PSTN Gateway Address Using Topology Manager: Worked Example

This example demonstrates how, during the implementation of the Register URL for the telephony gateway or soft switch for SIP domain task, you must manually configure the PSTN gateway address by registering HzCTDPstnGatewayApp to a given environment using Oracle Fusion Topology Registration.

These steps configure the address of the SIP Public Switched Telephone Network (PSTN) gateway or SIP soft switch serving the users within that domain. This address is needed by Click-to-Dial to correctly form the SIP addresses required by WebLogic Communication Services. For example:

```
SIP:+1650-555-1212@pstn_gateway.oracle.com;user=phone
```

where `pstn_gateway.oracle.com` is the SIP domain. The SIP domain can also be expressed in the format 10.1.1.1 (IP address).

### Configuring PSTN Using the Topology Manager

To configure PSTN:

1. Sign in to Oracle Sales Cloud as a user that has **application implementation consultant** and **WebLogic Services administration** roles.
2. In Setup and Maintenance, click Register Enterprise Applications from the regional area under **Topology Registration**.
3. On the Register Enterprise Applications page, click the plus icon to add an enterprise application. An Add Enterprise Application dialog box appears.
4. Enter the new application information: Click **Search** in the Enterprise Application list field. Enter **HzCTDPstnGatewayApp** in the name field and click **Search**.
5. Click **OK**.
6. Enter the other fields in the Add Enterprise Application dialog box.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>HzCTDPstnGatewayApp</td>
</tr>
<tr>
<td>Server Protocol</td>
<td>SIP</td>
</tr>
<tr>
<td></td>
<td>This field is ignored by Click-to-Dial. Oracle WebLogic Communication Service (OWLCS) always uses the SIP protocol.</td>
</tr>
<tr>
<td>External Server Host</td>
<td>10.143.167.91 (Used as an example)</td>
</tr>
<tr>
<td></td>
<td>A host name can be used instead of an IP address.</td>
</tr>
<tr>
<td>External Server Port</td>
<td>0 (Used as an example)</td>
</tr>
<tr>
<td></td>
<td>This field is ignored by Click-to-Dial.</td>
</tr>
</tbody>
</table>

7. Click **Save and Close**.

---

**Flexfields**
Flexfields: Overview

A flexfield is an extensible set of placeholder fields associated with business objects and placed on the application pages. You can use flexfields to extend the business objects and meet enterprise data management requirements without changing the data model or performing any database programming. Flexfields help you to capture different data on the same database table.

For example, an airline manufacturer may require specific attributes for its orders that aren’t predefined. Using a flexfield for the order business object, you can create and configure the required attribute.

Flexfields that you see on the application pages are predefined. However, you can configure or extend the flexfields, or modify their properties. Users see these flexfields as field or information attributes on the UI pages. To use flexfields, search for and open the Define Flexfields task list in the Setup and Maintenance work area. You can use the following tasks contained within it:

- **Manage Descriptive Flexfields**: Expand the forms on the application page to accommodate additional information that is important and unique to your business. You can use a descriptive flexfield to collect custom invoice details on a page displaying invoices.
- **Manage Extensible Flexfields**: Establish one-to-many data relationships and make application data context-sensitive. The flexfields appear only when the contextual data conditions are fulfilled. Thus, extensible flexfields provide more flexibility than the descriptive flexfields.
- **Manage Key Flexfields**: Store information combining several values, such as a number combination. The key flexfields represent objects such as accounting codes and asset categories.
- **Manage Value Sets**: Use a group of values to validate the data entered in the flexfields.

**Note:** You can manage value sets within the Manage Descriptive Flexfields or Manage Extensible Flexfields tasks.

For more information about specific predefined flexfields, open the Setup and Maintenance work area, and use the tasks in the Define Flexfields task list.

Types of Flexfields

The following three types of flexfields provide a means to customize the applications features without programming:

- Descriptive
- Extensible
- Key

Related Topics

- Descriptive Flexfields: Explained
- Extensible Flexfields: Explained
- Key Flexfields: Explained
- Modules in Application Taxonomy: Explained
Configuring Flexfields: Overview

Configuring a flexfield ranges from identifying the need for extending a business object with custom attributes to integrating the custom attributes into the deployment. In the case of key flexfields, configuring the flexfield involves identifying value set assignments and determining segment structures.

Overall Process for Configuring Custom Attributes

For descriptive and extensible flexfields, the overall configuration process involves the following:

1. Use the Highlight Flexfields feature from the Administration menu to find flexfields on pages associated with business objects.
2. Plan the flexfield configuration.
3. Plan flexfield validation.
4. Define the attributes by configuring the flexfield segments.
   a. Use the Manage Extensible Flexfields or Manage Descriptive Flexfields tasks, or use the Configure Flexfield icon button directly on the page where the flexfield is highlighted. For simple configurations, use the Add Segment, Add Context Value, and Edit Segment icon buttons directly on the page where the flexfield is highlighted.
   b. Optionally, validate the flexfield configuration.
   c. Optionally, deploy the flexfield to a sandbox for initial testing.
5. Deploy the flexfield to the mainline metadata to display the custom attributes on the application pages and to make them available for integration with other tools such as Oracle Business Intelligence.
6. Perform the necessary steps to integrate the custom attributes into the technology stack.

A simple configuration is limited to such actions as adding a format-only field or adding a field with a basic list of values.

Overall Process for Configuring Custom Keys

Using key flexfields, you can configure intelligent key codes comprised of meaningful parts according to your business practices. You configure the key flexfield to have one segment for each part that makes up your key code.

For key flexfields, the overall configuration process involves the following:

1. Use the Highlight Flexfields feature from the Administration menu to find flexfields on pages associated with business objects.
2. Plan the flexfield configuration.
3. Plan the flexfield validation.
4. Define the value sets before configuring the key flexfield segments by going to the Manage Value Sets task.
5. Define the key flexfield structures and their segments, and define structure instances for each structure.
   a. Use the Manage Key Flexfields task or the Configure Flexfield icon button directly on the page where the flexfield is highlighted.
   b. Optionally, validate the flexfield configuration.
   c. Optionally, deploy the flexfield to a sandbox for initial testing.
6. Deploy the flexfield to the mainline metadata to display it on the application pages and to make it available for integration with other tools such as Oracle Business Intelligence.
7. Perform the necessary steps to integrate the flexfield into the technology stack.
How can I access predefined flexfields?

Search for predefined flexfields using the Define Flexfields task list:

1. In the Setup and Maintenance work area, search for the **Define Flexfields** task list and expand it to view the tasks.
2. Open the task that corresponds to the flexfields you are searching for.
3. Enter any of the search parameters and click **Search**.

   **Tip:** If you don’t know the flexfield name or the code, use the **Module** field to filter search results.

4. Click a flexfield to view its details.

Help

Setting Up Help: Overview

Oracle Applications Help works by default without any setup required. You can optionally select the help features you want, perform tasks in the Define Help Configuration task list, and customize help.

Help Feature Choices

You can select help feature choices in the Set Help Options page.

Use the following procedure:

1. Sign in to the applications as a setup user.
2. Navigate to the Setup and Maintenance work area.
4. In the Define Help Configuration task list, click the Set Help Options task.
5. Set the help features using the guidance in the following table.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Web Sites Available from Help Site</td>
<td>Select which web sites you want to make available to users from the help portal.</td>
</tr>
<tr>
<td>Help Site Customization</td>
<td>Set the name of the custom help site that is displayed to users. Set images to be displayed in the custom help site.</td>
</tr>
</tbody>
</table>
6. Save your changes.

Other Help Configuration Tasks
You also can use these tasks in the Define Help Configuration task list to configure Applications Help for all users:

- Assign Help Text Administration Duty: Determine who can customize help.
- Manage Help Security Groups: Set up security to limit access to certain help files.

For more information on these tasks, see the online help.

Help Customization
After you configure help, you can review the predefined help and see if you want to add or customize any content. For example, you can customize:

- Help text displayed when a user hovers over a button, link, icon button, or tab title
- Help text that appears on the page, for example, hints
- Page-level help windows by adding custom files to show in the windows that link out to the online help

For more information, see the online help and the following guides:

- Oracle Applications Cloud Customizing the Applications for Functional Administrators
- Oracle Sales Cloud Customizing Sales guide

Related Topics
- Customizing Help in Help Windows: Procedure
- Customizing Help: Overview
- Help File Customization: Overview
- Customizing Help That Appears on the Page: Highlights
- Why can’t I see certain sections on the Set Help Options page?

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Lightbox
Setting Up Sales Lightbox: Points to Consider

Oracle Sales Cloud Lightbox is a content library that you can use to store, access, and share files, such as slide decks, web-based content, images, and .pdfs. Lightbox lets users store, access, and share content with individuals, accounts, and opportunities.

You can find more information about Lightbox end user tasks and capabilities in the online help and in the Oracle Sales Cloud Using Sales guide.

Supported File Types

Sales Lightbox supports the following file types:

- Microsoft Powerpoint (.pptx): 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.
- Portable Document Format (.pdf): Standard .pdf files are supported.
- HTML: HTML in the form of microsites: See the topic, Using Microsites in the Lightbox Content Library, for more information.
- .jpg and .png: Image files in the .jpg and .png formats are supported.

For information about the actions that can be performed on different content types, see the topic, Available Lightbox Actions for Different Content Types.

Upload File Size

The maximum file size for a presentation to be uploaded is 100 MB.

Salespeople Access

Salespeople can access Sales Lightbox without any setups required. All of the default sales user roles (for example, Sales Representative, Sales Manager, and Sales VP) can access the feature using the Sales - Lightbox menu. In addition, the Sales Administrator user has all of the same permissions that sales users do. For additional details on sales user tasks for Sales Lightbox, see the Oracle Sales Cloud Using Sales guide.

Lightbox Administrator Access

In addition to the sales user permissions, the supplied Application Implementation Consultant (a type of Sales Cloud setup user) and Customer Relationship Management Application Administrator job roles have additional privileges to:

- Access the All Content view: This view lets the administrator see all content in the application, not just his own. Sales users cannot see this view.
- Delete content: Only the administrator can delete content not owned by him.

Related Topics

- Sales Lightbox: Overview
- Using Microsites in the Lightbox Content Library

Messages
Messages: Explained

Messages provide users with information about business or application errors or warnings.

Typically, messages inform the users about the following:

- Missing or incorrect data
- Status of an application, page, or a business object
- Status of an ongoing process
- Result of a user action

Besides notifying users about the problem, messages provide guidance to users on taking corrective action. Messages also warn users about the consequences of a certain action.

Oracle provides a set of predefined messages that are stored in a message dictionary. To create additional messages or modify the existing ones, use the Manage Messages task in the Setup and Maintenance work area.

**Note:** Don’t delete predefined messages unless you are sure that they aren’t used anywhere.

Message Dictionary

The message dictionary stores messages that the application requires at run time. Messages are predefined for specific applications and modules, but a few are common messages that can be used in any application or module.

When you create messages, use the message text and the following components to cover additional details addressing users and help desk personnel:

- **User Details:** A detailed explanation of the message short text meant for users.
- **Administrator Details:** Details of the identified problem meant for the help desk personnel. The end users don’t see this text.
- **Cause:** An end-user version of the cause of error.
- **User Action:** Instructions to users for addressing the identified problem. Where there is no guidance for end users, they must approach the help desk.
- **Administrator Action:** Corrective action that help desk personnel must take to correct the problem. This information is not available to the end users.

Related Topics

- Message Types: Explained
- Creating and Editing a Message: Procedure

Common Messages: Points to Consider

Message names that begin with FND_CMN are common messages. Each common message can appear in multiple places in any product family across Oracle Fusion Applications. For example, the FND_CMN_NEW_SRCH message can be used for any search to indicate that no results were found. Common messages of type error or warning are part of the message dictionary.
Creating and Editing Common Messages

You can create custom common messages for use in multiple places. However, ensure that you follow the predefined naming convention and numbering series associated with the application or module.

**Note:** Don’t use FND_CMN as the prefix for your custom messages because all the predefined common messages begin with it.

Common messages can be used in any application. Therefore, consider the ramifications if you edit any aspect of the message, including incident and logging settings. Changes would be reflected in all instances where the message is used. For example, if you change the message text, ensure that the text is generic and applies to the entire site of Oracle Fusion Applications implementation.

Navigation

Understanding Default Navigation Components

Sales users, such as sales representatives and sales managers, typically access the Oracle Sales Cloud simplified user interface (UI) to perform their daily tasks. After signing in, they land on the home page and use the springboard or global area icons to access other areas of the application.

Default navigation is set by the application, but can be configured to meet your business needs.

Unified Home Page

The Oracle Sales Cloud home page provides unified access to both desktop and simplified interfaces. The home page lets users quickly pick from the available icon groups and then navigate to a work area to perform their tasks. A single click on the Home icon or the logo quickly returns users back to the home page with its springboard and infolets.

The URL to access the home page is: https://:<hostname>/HomePage/faces/FuseWelcome.

Access to the Desktop UI

By default, if a Sales Cloud application has both simplified and desktop pages, the application opens the simplified version of the page from the Navigator or springboard, when accessed using the home page URL.

The following profile options control whether users can access the desktop UI:

- **Desktop Pages Version Enabled (FND_CLASSIC_INTERFACE):** Set this profile option to Yes to have the application open the desktop page instead of the simplified pages. To set this profile option, use the Manage Administrator Profile Values task, signed in as a setup user or as the sales administrator. This profile option can be set at Site or User levels. Note that this profile option only controls the Navigator and springboard menus’ behavior, not in-application behavior.

- **Allow Access to Customer Center Desktop UI (ZCA_ALLOW_CLASSIC_INTERFACE):** This profile option limits access to the desktop UI for all top-level Sales objects. It is not able to be updated, and is set based on whether your implementation is a new one or an upgrade. For upgrading customers, it is set to Yes, allowing these customers to continue to have access to desktop UI. For new customers, it is set to No, which restricts access to the desktop UI. You can check the value of the profile option using the Manage Administrator Profile Values task.
signed in as the sales administrator. The following are the desktop UI restrictions based on the profile option. For more information, contact My Oracle Support.

- More Details action: If set to Yes, then the More Details action (which is used to navigate to the desktop UI) appears for all user roles.
- Navigator menu items: If set to No, several Navigator menu items that point to the desktop UI pages are hidden and cannot be displayed by configuring menus in the Tools, Structure page.
- Application Composer and desktop UI pages: If set to No, then desktop UI pages are not available for customization using Application Composer.

Springboard
The grid of icons on the home page is called the springboard. The springboard is also available as a strip above simplified pages.
Sales end users click the springboard icons to open the work areas and dashboards used in their main tasks.
If a user has access to more than 16 work areas, the application will automatically group the work areas under a parent icon (or folder).
The following table describes the default application behavior for grouping work areas within springboard icons. This behavior applies to all sales user roles.

<table>
<thead>
<tr>
<th>User Access</th>
<th>Icon Display</th>
</tr>
</thead>
<tbody>
<tr>
<td>User has access to only one page entry/work area within a specific folder</td>
<td>The icon for the page entry/work area is displayed at the top level. For example, a sales representative with access to only leads, sees just the Leads icon at the top level on the home page.</td>
</tr>
<tr>
<td>User has access to multiple page entries, up to 16</td>
<td>All page entry icons display at the top level.</td>
</tr>
<tr>
<td>User has access to more than 16 page entries</td>
<td>Page entries are grouped under a parent icon/ folder (for example, the Sales icon containing work areas for accounts, opportunities, and leads).</td>
</tr>
<tr>
<td>User has access to 15 or fewer page entries outside the Tools folder</td>
<td>These icons appear at the top level, and only the icons under Tools remain in a folder.</td>
</tr>
</tbody>
</table>

Navigator
The Navigator is the main menu, found in the global area. The following figure shows the Navigator icon.

Users access the Navigator to get to their work areas and dashboards. Note that the Navigator might have more page entries than the springboard.

Customizing the Springboard and Navigator
You can customize the springboard and Navigator using the Structure tool available to setup users. For example, you can:
- Specify whether certain Navigator menu items, springboard, and home page features display.
• Customize the structure, grouping, and ordering of the navigation menu items and the springboard icons.

To understand how to configure the springboard and home page to fit your unique business needs, see the following guides:

• Oracle Sales Cloud - Customizing Sales
• Oracle Applications Cloud - Customizing the Applications for Functional Administrators

Global Area
The global area is the area across the top of the UI. It is persistent across pages for all users. By default, the global area icons and links let users access:

• Home: Returns the user to the default home/landing page.
• User settings and actions: Among other actions, users can access personalization features, user preferences, and customization tools (if allowed).
• Global Search: If enabled, users can search key fields in multiple objects across the cloud service.
• User assistance: Lets users toggle the page-level and region-level help icons on or off.
• Favorites and Recent items: Users can access links to pages that they have bookmarked or have opened recently.
• Watchlist: Users can access a list of transaction-related items that pertain to them.
• Notifications: Contains a user’s appointment and task notifications.

You can customize the global area template. For more information, see the topics on customizing the global page template in the Oracle Applications Cloud - Customizing the Applications for Functional Administrators guide.

Infolets
Infolets are configurable information portals on the dashboard that provide report summaries based on sales users’ transactional sales data. Infolets, when available, show up as a row of dots on the home page, above the springboard. The following figure shows an example of the pagination controls for infolets.

![Pagination Controls for Infolets](image)

You can create new infolets, and add or remove them as needed. For more information, see the Oracle Sales Cloud Creating and Administering Analytics guide.

Related Topics

• Navigating in the Application: Explained
• Customizing the Navigator and Springboard: Overview
• Defining Settings for Home and Navigation: Explained
• Oracle Sales Cloud Customizing Sales
• Why are some springboard icons not displayed on my springboard?
Defining Notes: Points to Consider

A note is a record attached to a business object. Notes capture nonstandard information received as you do business. When setting up notes for your application, you should consider the following points:

- Which new note types you want to add.
- How you want to map these new note types to business objects in your area.

Note Types

Note types are assigned to notes when they’re created, to categorize them for future reference. During setup you can add new note types, and use a process called note type mapping to restrict them by business object type. When deciding which new note types you want to add, keep in mind how you want your users to search for, filter, and report on these notes.

Note Type Mappings

If you add new note types, you must map them to the business objects you use in your product area. Here are some points to consider when mapping note types:

- When you select a business object other than Default Note Types, you only see the note types that apply to that object.
- If no other note types appear, then note type mapping doesn’t exist for that object and the default note types are used. Select Default Note Types to see which default note types exist in the application.
- If you modify a default note type, it affects all the business objects that don’t have a note type mapping.

Suppose you decide to add a new note type of Analysis for your product area of Sales-Opportunity Management. You use note type mapping to map Analysis to the Opportunity business object. Now, every time you create or edit a note for an opportunity, you see Analysis as an available note type option.

When deciding which note types to map to business objects, you should keep the same considerations in mind that you did when you decided which note types to include.

Related Topics

- Extending Oracle Sales Cloud: How It Works

Watchlist

Setting Up the Watchlist: Overview

The Watchlist is a portlet that displays a list of a user’s transaction-related items, such as expenses. It’s available using the Watchlist icon in the global area. For all users across the site, you can disable or enable predefined Watchlist categories and items, edit their names, and determine how often item counts refresh.

You cannot delete predefined Watchlist categories and items, nor create any for the site. Users can create their own Watchlist items through saved searches.

You use the Set Watchlist Options task in the Setup and Maintenance work area to access the Watchlist setup page. Note you must sign in as a setup user to configure Watchlist choices.
Disabling Predefined Categories and Items

Use the Set Watchlist Options page to enable or disable predefined Watchlist categories and items. Disabling any category or item also disables associated processes involved in calculating the Watchlist item counts for all users. These processes include creating data caches, performing security checks, launching services across domains, running queries, and so on.

An item with the Predefined type represents the actual predefined Watchlist item that appears in the Watchlist. If you disable this type of Watchlist item, then:

- The item is not available for users to display in their watchlist
- The item is removed from any watchlist where it is currently displayed

A Watchlist item with the user-created saved search type does not appear in the Watchlist; it controls the display of the Manage Watchlist button or menu item in pages with saved searches. If you disable this type of Watchlist item, then:

- The Manage Watchlist option is not available to users in the corresponding work area, so users cannot use their own saved searches as Watchlist items. A message is displayed to users when they try to use this option.
- Any user-defined saved searches from that work area already used as Watchlist items are no longer available in the users’ watchlist. The user-defined saved searches are still available to be used for searching, but not for the Watchlist.

If you disable a Watchlist category, then the category is not available for users to include in their watchlist, and all Watchlist items within the category are also disabled.

Ultimately, the Watchlist for any user contains the subset of categories and items that are enabled in the Set Watchlist Options page:

- Plus any items based on user-defined saved searches
- Minus any categories or items that the user chooses to hide using Watchlist preferences
- Minus any items with no results found, if the user chooses to hide such items using Watchlist preferences

Specifying Refresh Intervals

All Watchlist items have a predefined refresh interval, which controls how often the query that calculates the count for a Watchlist item can be run. Use the Set Watchlist Options page to edit the interval values. What you specify as the refresh interval for a Watchlist item of type User-created Saved Search applies to all Watchlist items based on saved searches created by users on the corresponding search page.

When the user is in the Welcome dashboard with the Watchlist open for at least two and a half minutes, the query automatically runs for all Watchlist items if no refresh already ran in this user session. To subsequently run the query again, users can manually refresh the Watchlist region. The Refresh icon is enabled after five minutes since the last refresh.

**Note:** During a refresh, the query runs for an individual Watchlist item only if the time since the last query for this item is equal to or greater than the specified refresh interval. Since the manual refresh of the entire Watchlist is not available until five minutes after the last refresh, you should not set a Watchlist item refresh interval that is less than five minutes.

When users open Watchlist from the global area, a refresh automatically runs if five minutes have passed since the last refresh. During this refresh, the query runs for an individual Watchlist item only if the time since the last query for this item is equal to or greater than the specified refresh interval.

For example, you set the interval to eight minutes for a particular Watchlist item. When the user signs in and goes to the Welcome dashboard, with the Watchlist open, the query automatically runs for this Watchlist item after two and a half minutes. Every two and a half minutes after, a check is performed for stale counts and new cached counts are displayed.
Five minutes after the query ran, the Refresh icon is enabled and the user performs a manual refresh. However, the query does not run for this Watchlist item, because the refresh interval is eight minutes. The user navigates away from the Welcome dashboard and opens the Watchlist from the global area six minutes later. A refresh automatically runs because more than five minutes have passed since the last refresh. This time, the query runs for this Watchlist item because it has been more than eight minutes since the query last ran for this item.

Editing Predefined Category and Item Names

Predefined Watchlist category and item names are stored as meanings of standard lookups. Lookup types for predefined categories end with WATCHLIST, for example EXM_EXPENSES_WATCHLIST. Edit the lookup type meaning to change the category name. To change item names, edit lookup code meanings for that lookup type.

For more information on the Watchlist, see the related topics and then online help.

Related Topics
- Disabling and Enabling Watchlist Categories and Items: Points to Consider
- Refresh Intervals for Watchlist Items: Explained
- Creating Watchlist Items: Procedure
- Displaying and Hiding Watchlist Items: Procedure

Miscellaneous Features

How can I enable the privacy statement?

In the Setup and Maintenance work area, open the Manage Applications Core Administrator Profile Values task and search for the Privacy Statement URL profile option. In the profile values section, update the Profile Value text box with the full URL of the web page containing the privacy content.

In the global area, click your user name and from the Settings and Actions menu, select About This Page. Click Privacy Statement to view the linked web page.

Public Unique IDs: Explained

Using document sequencing, the application generates a unique number (or ID) for each business object record when the record is created in the database. Sales users cannot easily read or use unique IDs because of their length and complexity. As an administrator, you can configure the unique ID that’s generated, in order to make it more user-friendly and readable. This user-friendly value is called the public unique ID.

You have these options for setup:
- Use the default setup, where no implementation steps are required.
- Use the basic setup, which is configurable to a certain degree. If you use this setup, the default setup is not used.
- Use an advanced setup which is more complex and configurable. If you use this setup, the basic setup is not used.

The following table shows the setup options and where to find more information about the setup.
<table>
<thead>
<tr>
<th>Setup Option</th>
<th>Description</th>
<th>Where to Find More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Setup</td>
<td>In this setup, no implementation steps are required. The application automatically generates a unique 15-digit numeric ID for each record. The document sequencing begins with a 1.</td>
<td>No additional documentation, other than this introduction.</td>
</tr>
<tr>
<td>Basic Setup</td>
<td>In this setup, you set two profile options where you configure the radix (or base numbers and characters) and prefix to use. The application generates an alphanumeric public unique ID instead of the default numeric public unique ID for each record.</td>
<td>See the Public Unique ID Basic Setup section in this topic.</td>
</tr>
<tr>
<td>Advanced Setup</td>
<td>In this setup, you define a different radix, starting number, and prefix for each object.</td>
<td>See the Public Unique ID Advanced Setup section in this topic.</td>
</tr>
</tbody>
</table>

### Public Unique ID Basic Setup

In the basic setup, you can define a single prefix that is shared across all business objects in the implementation. In addition, you have several different radix values that can be used. Together these values form the public unique IDs.

To perform the basic setup, you set two profile options:

- CRM Public Unique ID String Encoding profile option: Controls the characters used in the encoding of the public unique ID based on a radix, or base number.
- CRM Public Unique ID Prefix profile option: Defines the optional prefix value for the public unique ID.

#### CRM Public Unique ID String Encoding profile option (ZCA_PUID_RADIX):

This profile option determines the set of numbers and letters used in creating the public unique ID. The default value is null. After you set the radix, the application converts the public unique ID into user-friendly IDs, using alphanumeric characters instead of numeric digits.

The following base values are available:

- Numbers 0-9, letters A-F
- Letters A-Z, upper case
- Numbers 2-9, letters BCDFGHJKLMNPQRSTVWXYZ
- Numbers 0-9, letters ABCDEFGHJKLMNPQRTUWXYZ
- Numbers 0-9, letters A-Z, upper case
- Numbers 0-9, letters A-Z, letters a-z

The values for the radix are stored in the lookup type, ZCA_PUID_ENCODING. This lookup type is accessible using the Manage Standard Lookups task in Setup and Maintenance.

#### CRM Public Unique ID Prefix profile option (ZCA_PUID_PREFIX):

In this profile option, you optionally define the prefix for the public unique ID at the site level. After you set this profile option to the prefix you want, application inserts the prefix before the public unique ID base encoded document sequence value. For example, you may want the records for the pharmaceutical divisions of your company to be denoted with public unique IDs and the prefix Pharma or Pharma1, Pharma2, and so on. By default, the prefix has no value.
Keep the following points in mind:

- If you enter a prefix value, you must set a radix value. You cannot use the prefix setting by itself.
- You must define the delimiter, or separation character, in the prefix.
- The concatenated public unique ID and prefix must not exceed the defined field length, which is usually 30 characters.

Use the following procedure to set the profile options.

1. Sign into the application as the sales administrator or as a setup user.
2. Navigate to the Setup and Maintenance work area.
3. Search for and select the Manage Public Unique Identifier Profile Options task.

The Manage Public Unique Identifier Profile Options page appears.

4. Click the ZCA_PUID_RADIX option.
5. In the ZCA_PUID_RADIX: Profile Values section of the page, click the Profile Option Values list of values and select the base numbering value.
6. Click Save and Close.
7. Optionally, click the ZCA_PUID_PREFIX option.
8. In the ZCA_PUID_PREFIX: Profile Values section of the page, in the Profile Value box, enter the prefix and the delimiter you want, if any. For example, enter CDRM_.
9. Click Save and Close.

Public Unique ID Advanced Setup

In the advanced setup, you can define a different prefix and numbering radix for each object.

Keep the following points in mind:

- If you enter a prefix value, you must set a radix value. You cannot use the prefix setting by itself.
- You must define the delimiter, or separation character, in the prefix.
- The concatenated public unique ID and prefix must not exceed the defined field length, which is usually 30 characters.
- The value in the Starting Number field of the configuration screen determines the length of the numeric portion of the public Unique ID.

Use the following procedure to configure the radix and optionally, the prefix in the advanced setup.

1. Sign into the application as the sales administrator or as a setup user.
2. Navigate to the Setup and Maintenance work area.
3. Search for and select the Manage Public Unique Identifier Sequence Generation task.

The Manage Public Unique Identifier Sequence Generation page appears.

4. Click Create.

The Create Sequence Generation window appears.

5. In the Object list of values, select the object for which you are configuring the public unique ID.
6. In the Radix list of values, select the base numbering to use. This list of possible radix values is the same list of values that are provided in the current ZCA_PUID_RADIX profile option.
7. In the Prefix box, enter the prefix you want to use for the object and unique ID.

   - Enter a maximum of five characters.
8. In the Starting Number box, enter the starting number.
   - Do not use any commas or periods in the number.
   - This value determines the length of the number portion of the public unique ID.
   - A minimum value of 100,000 is validated when a starting number is specified.

9. Repeat for other objects.

10. Click **Save and Close**.

The following table shows some possible prefix and radix values and results.

<table>
<thead>
<tr>
<th>Prefix</th>
<th>Radix</th>
<th>Starting Value</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>NULL</td>
<td>NULL</td>
<td>NULL</td>
<td>The default setup profile option values are used.</td>
</tr>
<tr>
<td>NULL</td>
<td>Numbers 0-9, letters A-F</td>
<td>NULL</td>
<td>You do not need to specify a prefix in order to generate new public unique IDs.</td>
</tr>
<tr>
<td>NULL</td>
<td>Numbers 0-9, letters A-F</td>
<td>10000000</td>
<td>You do not need to specify a prefix in order to generate new public unique IDs.</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 0-9, letters A-F</td>
<td>NULL</td>
<td>A public unique ID is generated. The first value generated will be A-00000000001, since the first two characters are used for the prefix and the starting number is not specified; thus, the number 1 is used by default.</td>
</tr>
<tr>
<td>A-</td>
<td>Numbers 0-9, letters A-F</td>
<td>40000000</td>
<td>A public unique ID is generated. The first value generated will be A-00040000000, since the first two characters are used for the prefix and the starting number is specified at 4,000,000.</td>
</tr>
</tbody>
</table>

**Related Topics**

- Document Sequences: Explained
- Document Sequences: Points to Consider
7 Setting Up Geographies and Territories

Defining Geographies: Overview

You must import and set up reference geography data for the countries where you do business if you are setting up sales territories based on geography or want to validate address entry.

Geography data also lets you set up territories and forecasting based on geographical regions. You must define geographies before creating territories or validating addresses in Oracle Sales Cloud.

To define geographies, you must:

- Define the geography structure and hierarchy for a country: A geography structure is a hierarchical grouping of geography types for a country. Geography hierarchy is a data model that lets you establish conceptual parent-child relationships between geographies. Oracle Sales Cloud uses the geography structure and hierarchy data to verify addresses, create territories, and define forecasting.
- Define the geography validations for a country: Geography validation determines the geography mapping and validation for a country’s address styles, as well as the overall geography validation control for a country. You must enable validation to the level of granularity you need for your territories.

You can define geography structure and hierarchy either manually, or by importing them. You can import geography data either by using the file-based import or by using the tool of your preference to load the data. You can import Oracle-licensed Nokia data from Navteq for those countries where the data is available.

For more information about setting up geographies, see the chapter on setting up geography reference data for territories and addresses in the Oracle Sales Cloud Getting Started with Your Implementation guide.

For more information on importing third-party geography data, see the Importing Geographies chapter of the Oracle Sales Cloud Understanding File-Based Data Import and Export guide.

Related Topics

- Oracle Sales Cloud Getting Started with Your Implementation
- Oracle Sales Cloud Understanding File-Based Data Import and Export

Territory Management Features: Overview

Sales territories form the fundamental infrastructure of sales management because territories define the jurisdiction that salespeople and channel managers have over accounts, contacts, households, partners, and associated transactions.

Territories provide the rules for automatically assigning salespeople and other resources to accounts, contacts, households, partners, leads, and opportunity line items. The structural hierarchy of territories defines resource responsibilities and controls access to customer and sales data.
Summary of Features

The key features of Territory Management include the following:

- Territories serve as a basis for forecasting, quota distribution, compensation, and analysis of sales performance. Forecasts roll up according to the territory hierarchy.
- Use territories to assign resources and secure access to accounts, contacts, households, partners, leads, and opportunities.
- Channel sales managers are assigned to partners and partner transactions within their territories.
- Define territories by logical boundaries called dimensions. Examples of these include geography, industry, product, customer size, sales channel, and organization type.
- Define territories by selecting a list of specific accounts, contacts, households, or partners.
- Model territory realignments and perform what-if analyses to find optimal territory changes.
- Analyze metrics to understand the results of changes to the boundaries of each territory or to understand the ongoing performance of active territories. View gap and overlap reports to see whether there are any undesired results.
- Use assignment preview to double-check that each territory is getting the right customers.
8 Setting Up Multiple Currencies

Setting Up Multiple Currencies: Overview

Oracle Sales Cloud supports multiple currencies, multiple daily rates, and currency rate conversion. If you are going to use multiple currencies, at a minimum you need to:

- Specify corporate currency: You may have already done this step if you followed the currency setup in the Oracle Sales Cloud Getting Started With Your Implementation guide. If so, you do not need to perform this step again.
- Specify the default currency: You may already have done this step if you followed the currency setup in the Oracle Sales Cloud Getting Started With Your Implementation guide. If so, you do not need to perform this step again.
- Import or enter daily currency conversion rates.
- For opportunities integration, set the multi-currency profile option.
- Enable the currencies you are going to use, if you previously disabled them.

For more information, see the topic, Setting Up Multiple Currencies.

Oracle Sales Cloud also supports different currency conversion rate types, allowing your business to maintain different conversion rates between currencies for the same period. Examples of conversion rate types are supplied: Spot, Corporate, User, and Fixed. For more information, see the guide, Oracle Financials Cloud Implementing Enterprise Structures and General Ledger, and the online help.

Initial Tasks for Currencies

Setting Up Multiple Currencies

You must complete several steps to enable multiple currencies in Oracle Sales Cloud, as outlined in this topic. The following are the high-level steps to enable multiple currencies in Oracle Sales Cloud. All of the steps shown in the table are covered in this topic.

<table>
<thead>
<tr>
<th>Step</th>
<th>Optional or Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download the desktop integration installer.</td>
<td>Required</td>
<td>Download and run the installer that allows integration with the spreadsheet where you enter daily currency conversion rates.</td>
</tr>
<tr>
<td>Set Sales Cloud corporate currency and rate type profile options.</td>
<td>Required</td>
<td>Set the two profile options that specify default corporate currency and rate type for Sales Cloud.</td>
</tr>
<tr>
<td>Define daily currency conversion rates.</td>
<td>Required</td>
<td>Populate and submit the spreadsheet with the daily currency conversion rates.</td>
</tr>
<tr>
<td>Step</td>
<td>Optional or Required</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------------------------------------</td>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Set the multicurrency profile option for opportunities.</td>
<td>Optional</td>
<td>For opportunities, set the multicurrency profile option.</td>
</tr>
<tr>
<td>Make the opportunity header currency an editable field.</td>
<td>Optional</td>
<td>For opportunities, make the opportunity header currency an editable field.</td>
</tr>
<tr>
<td>Ensure currencies are enabled.</td>
<td>Optional</td>
<td>Ensure that all of the currencies you plan to use are enabled for use.</td>
</tr>
<tr>
<td>Ensure setting of the environment profile option specifying default currency.</td>
<td>Optional</td>
<td>Ensure that the profile option for default corporate currency in the applications is set to the currency you want to be the default currency.</td>
</tr>
</tbody>
</table>

After you have enabled multiple currencies, sales users can set their preferred currency for the transactional pages and for business intelligence. For more information, see the topic on currency preferences, linked at the end of this topic.

**Download the Desktop Integration Installer**

The Oracle Desktop Integration Installer enables integration of a Microsoft Excel spreadsheet into the web applications. Use the following steps to download the Desktop Integration Installer:

1. Sign in as a setup user and, in the Navigator, click the Download Desktop Integration Installer link in the Tools category.

   ![Note](https://example.com) **Note:** If that link does not work, then in the URL, replace after /homePage/ with /desktop_installer/OracleFADesktop.exe. Here is an example: https://domainname:port/homePage/faces/AtkHomePageWelcome. The URL looks like this: https://domainname:port/homePage/desktop_installer/OracleFADesktop.exe.

2. Save the executable (.exe) file to your computer.

   If Microsoft Project is not installed on your computer, an error may occur if you select Complete Install. To avoid this error, click OK and then select custom install, and then deselect Microsoft Project Integration.

**Set Sales Cloud Default Currency Profile Options**

Use the following steps to set the Sales Cloud profile options, Corporate Currency Default and Exchange Rate Type Default.

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

   The Manage Currency Profile Options page appears.

3. Click **ZCA_COMMON_CORPORATE_CURRENCY** and set it to your default corporate currency. The display name for this profile option is Corporate Currency Default. It stores configured corporate currency.
4. Save your changes.
5. Click **ZCA_COMMON_RATE_TYPE** and set it to the default currency rate type. The display name for this profile option is Exchange Rate Type Default. It stores the default currency exchange rate type.
Define Daily Currency Conversion Rates

Use the following steps to define daily currency conversion rates.

1. Sign in as a setup user and navigate to and navigate to the Setup and Maintenance work area.
2. Search for and select the task, Manage Daily Rates.
   The Currency Rates Manager page appears.
3. Click the Daily Rates tab.
4. Click **Create in Spreadsheet** and open the CreateDailyRates spreadsheet. In this spreadsheet, you define the start and end dates of your exchange rate (month, year).
5. Add some rows to the spreadsheet and enter your data. Enter a maximum of 10 rows at one time for a successful import.

   **Note:** The CreateDailyRates spreadsheet does not actually have defined column heads in it. You enter data in columns A through H. Each row has a specific representation in the application when it creates the daily rates. Use the following example data as guidance:

   - Column A (this is the **From Currency** column): Enter the code for the currency to convert from. For example, enter **USD**.
   - Column B (this is the **To Currency** column): Enter the code for the currency to convert to. For example, enter **EUR**.
   - Column C (this is the **Conversion Rate Type** column): Enter the rate type used in the conversion. For Sales Cloud, enter **Corporate**.
   - Column D (this is the **From Conversion Date** column: Enter the start date of the conversion in the format, MM/DD/YY. For example, enter **12/31/2015**.
   - Column E (this is the **To Conversion Date** column): Enter the end date of the conversion in the format, MM/DD/YY. For example, enter **12/31/2016**.
   - Column F (this is the **Conversion Rate** column): Enter the currency conversion rate as a decimal. For example, enter **0.800300**.
   - Column G (this is the **Inverse Rate** column): Enter the currency inverse rate as a decimal. For example, enter **1.249400**.
   - Column H (this is the **Action** column): Enter the action. For example, enter **Insert**.

6. When you are done adding the data, click the **Submit** button in the spreadsheet.
   - After you submit the spreadsheet with the daily rate conversions, the application automatically runs the scheduled process, Import and Calculate Daily Rates. This process automatically calculates and enters inverse rates for you, so there is no need to enter these manually as separate rows. In other words, in the above sample data, there is no need to enter two additional rows with From Currency as EUR, To Currency as USD, and opposite conversion and inverse rates.
   - If successful, a confirmation message displays, saying that all rows were inserted successfully.

7. Optionally, to validate that the process ran successfully, navigate to the Scheduled Processes work area and search for the process, Import and Calculate Daily Rates. It should have a status of succeeded.

For more information about daily exchange rates and currency exchange rates types, see the applications help.

Enable Multiple Currencies in Opportunities

Some implementations may require different product lines on an opportunity to use different currencies. You can set up opportunities to use different currencies for the lines by setting the profile option, Multiple Currencies for Opportunity Revenue Lines Enabled.
After you set the profile option, you can use Oracle Page Composer to enable the Currency field as editable at the opportunity header level (see the following section, Make Opportunity Currency Field Editable). Note that with this setup, when a user changes the opportunity currency, the change is propagated to the opportunity product lines.

Use the following procedure to set the profile option to enable multiple currencies in opportunities.

1. Sign in as a setup user or the sales administrator and navigate to the Setup and Maintenance work area.
2. Search for and select the task, Manage Opportunity Profile Options.
   
   The Manage Opportunity Profile Options page appears.
3. Search for the profile option, **Multiple Currencies for Opportunity Revenue Lines Enabled** (the code is MOO_REVN_ENABLE_MULTICURRENCY) and select it.
4. Set to **Yes** to allow different currencies at the line and header levels in opportunities. Set to **No** to disallow the functionality.
5. Save your changes.

⚠️ **Caution:** Do not use Oracle Application Composer to modify the Currency Code list of values for any objects. To modify currency codes, go to Setup And Maintenance and find the Manage Currencies task and related page.

### Make Opportunity Currency Field Editable

By default, one currency is set for an opportunity and its product lines. This default currency is a user’s preferred currency (if set), or else the corporate currency, as specified in the profile option, Default Currency (FND_CURRENCY). In the opportunity edit page, the Currency list of values is read-only by default. If you have enabled multiple currencies, you can allow users to pick a different currency at the header level by making the Currency field editable using customization. Use the following procedure. For more information about using customization features, see the Oracle Sales Cloud - Customizing Sales guide.

**Prerequisites:**

- At least one opportunity must be created first, because, in this procedure, you must navigate to an opportunity in Page Composer design view.
- You must be familiar with and follow your organization's guidelines for making customization changes using sandboxes.

1. Sign in as the sales administrator.

   👤 **Note:** If you sign in as a setup user (or any user who is not part of the resource hierarchy), you will not be able to perform this procedure because you will not have access to opportunities.

2. Navigate to the opportunity landing page in the simplified UI.
3. Click your user name in the global area and select **Manage Sandboxes**. Create a new sandbox and activate it, or use an existing sandbox to activate.
4. When you are done activating a sandbox, go back to your user name in the global area and select **Customize Work Area Pages**.
   
   The Customize Pages dialog window opens.
5. Select a customization layer. For example, you can make changes only for users with a specific job role. Select **Site** to have the changes available to all users in the environment. Click **OK** on the Customize Pages dialog window.
6. You return to the opportunity landing page. By default, you start in Design view, which lets you navigate to the component you want to customize. You can tell you are in this view when the **Design** button above the page is highlighted.
7. In Design view, select an opportunity name in the opportunity landing page.
The Edit Opportunity page appears.

8. With the Edit Opportunity page still showing, in the background page, click the Select button, next to the Design button. Clicking Select activates the ability to edit the page components.

9. Hover around the Currency field until a border appears around it, and click the mouse. Two options appear: Edit Component and Edit Parent Component. Click Edit Component.

The Component Properties: Currency dialog window appears.

10. In the Label area of the Component Properties: Currency dialog window, deselect the Read Only option and click OK. You return to the Edit Opportunity page. The Currency field should now appear with a drop-down list icon next to it.

11. Save your changes by clicking the Close button in the background window.

You return to the opportunity landing page.

12. Verify the change by clicking the name of the opportunity again and validating that the Currency field is a drop-down list that you select.

13. Cancel and return to the opportunity landing page.

14. Select your user name in the global area and select Manage Sandboxes. Publish the sandbox that you were working in.

Ensure Currencies are Enabled

By default, all currencies are enabled. Optionally, ensure the currencies you plan to use are enabled. Use the following steps:

1. As a setup user, navigate to Setup and Maintenance and search for the task, Manage Currencies.

The Manage Currencies page appears.

2. In the Manage Currencies page, click Search to search for all currencies, without entering any search criteria.

3. Ensure that the Enabled option is set for each currency you plan to use.

4. Save your work.

Ensure Default Corporate Currency Profile Option Setting

The profile option Default Currency (FND_CURRENCY) specifies the default corporate currency for users in the transactional pages of Sales Cloud. The default currency is also used in a user’s forecast. By default, the profile option is set to US dollar. You can set this profile option at site level (affecting all users of the environment), at product level, or at user level. Users can set their own currency preference in the Personalization screens available in the user name menu. The setting a user sets for herself overrides the settings set in the profile option screens. Use the following procedure to ensure the default corporate currency is set for your environment.

1. Sign in as the sales administrator or as a setup user and navigate to Setup and Maintenance.

2. Search for and select the Manage Administrator Profile Values task.

The Manage Administrator Profile Values page appears.

3. Search for and select the profile option name, Default Currency, or the code, FND_CURRENCY.

4. Ensure the profile option value is set to your environment’s default currency at site level.

To set the profile option for a specific product area or user, create a new row in the table and enter the values as needed.

Related Topics

• Setting Currency Preferences for Analytics
Implementation Concepts for Currencies

Defining Currencies: Points to Consider

When creating or editing currencies, consider these points relevant to entering the currency code, date range, or symbol for the currency.

Currency Codes
You can’t change a currency code after you enable the currency, even if you later disable that currency.

Date Ranges
You can enter transactions denominated in the currency only for the dates within the specified range. If you don’t enter a start date, then the currency is valid immediately. If you don’t enter an end date, then the currency is valid indefinitely.

Symbols
Some applications support displaying currency symbols. You may enter the symbol associated with a currency so that it appears along with the amount.

Related Topics
- What’s the difference between precision, extended precision, and minimum accountable unit for a currency?
- What’s a statistical unit currency type?
- Euro Currency Derivation: Explained

Currency Precision Level for Quota Amounts: Explained

Currency amounts for quotas use the number of decimal places set in the Precision Level field for the corporate currency. If the precision level is not set, then amounts are saved and displayed with two decimal places.

You set the precision level for the currency in the Manage Currencies page. The currency you select for the profile option ZCA_COMMON_CORPORATE_CURRENCY, Corporate Currency Default, is the corporate currency.

Revalue Opportunity Currency Process: Explained

The Revalue Opportunity Currency process manages the effects of revaluation of currency exchange rates on opportunity revenue.

Opportunity revenue is stored in the user-entered currency (also called transaction currency) in the revenue model. The revenue model also stores two exchange rates:

- The exchange rate between the entered revenue currency and the configured corporate currency (as specified in the global configuration during the implementation), in order to facilitate construction of materialized views that roll up revenue metrics along the territory hierarchy.
The exchange rate between entered revenue currency and the entered opportunity-level currency, in order to calculate the opportunity summary revenue amounts as the sum of line revenue amounts. Opportunity line revenue amounts can be entered in currencies that are different from the currency specified at the opportunity level.

The process works in combination with two CRM profile options that store corporate currency and rate type:

- Corporate Currency Default: Stores configured corporate currency.
- Exchange Rate Type Default: Stores configured rate type.

Also keep in mind the following behavior of the process:

- The process can also be triggered when corporate currency, configured rate type, or exchange rate (or any combination of these) is modified, either directly through administrator intervention or when these currency parameters change in the general ledger.
- Only product lines in Open status are targeted by the batch process.
- When updating product lines, the process does not consider whether the revenue is already included in a forecast.
- Forecasting activity is paused when this process executes.

### Running the Process

Run the Revalue Opportunity Currency process from the process details screen available from the **Scheduled Processes** option on the Navigator menu. Select the job name Revalue Opportunity Currency.

The following are the steps to run the process in basic mode:

1. Sign in as a sales administrator or as a setup user.
2. From the Navigator, select **Scheduled Processes** (within the Tools category).
   
   The Scheduled Processes overview page appears.
3. Click **Schedule New Process**.
4. In the search dialog box, search for and select the **Revalue Opportunity Currency** process.
   
   The Process Details page appears.
5. Click **Submit**.

The following table shows the logical parameters expected by the batch process:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Default</th>
<th>Description</th>
</tr>
</thead>
</table>
| CRM Common Currency        | Stored in the profile option, Corporate Currency Default (ZCA_COMMON_CORPORATE_CURRENCY) | • Configured corporate currency.  
|                            |                                                                         | • Passed if corporate currency changes.  
|                            |                                                                         | • Program does not check against profile for match.                                           |
| CRM Common Currency Rate Type | Stored in the profile option, Exchange Rate Type Default (ZCA_COMMON_RATE_TYPE) | • Configured rate type.  
|                            |                                                                         | • Passed if there is a need to re-evaluate the conversion rate against a different rate type.  
<p>|                            |                                                                         | • If no value is passed, program uses the profile option value.                                |
| Business Unit Organization ID | No default                                                                 | Leave blank, and all business units will be targeted. Otherwise provide the specific business unit ID. |</p>
<table>
<thead>
<tr>
<th>Parameter</th>
<th>Default</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Opportunities per Database Update</td>
<td>500</td>
<td>Oracle recommends that you leave this parameter at the default value or blank (and program uses default value).</td>
</tr>
<tr>
<td>Last Batch Job Run Time Stamp</td>
<td>See Description column</td>
<td>This parameter can be used for batch program reruns. When a few opportunities have failed, the log will reflect all the failed opportunities, as well as provide a time stamp for “Start Batch Job Time Stamp”. Enter this time stamp on the second run of the batch program to limit the scope of the batch job to only the failed opportunities.</td>
</tr>
<tr>
<td>Effective Date</td>
<td>System date</td>
<td>Date passed to general ledger (using an API) to calculate the conversion rate. The program does not validate that the date must be in the future, so, in effect, any date can be passed.</td>
</tr>
</tbody>
</table>

**Impact of Process on Revenue Attributes**

The Revalue Opportunity Currency process impacts several revenue attributes, as shown in the following table.

<table>
<thead>
<tr>
<th>Revenue Model Attribute</th>
<th>Attribute Description/Function</th>
<th>Batch Process Update</th>
</tr>
</thead>
<tbody>
<tr>
<td>CRM_CURRENCY_CODE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CRM_CONVERSION_RATE_TYPE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CRM_CONVERSION_RATE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

These attributes store the exchange rate between revenue line currency and the corporate currency, and are used to construct the materialized views for Closed, Pipeline and Unforecasted revenue metrics along the territory hierarchy. For lines in status category of Open, these attributes are updated whenever a revenue line is created or updated or whenever an opportunity with revenue is updated or saved.

- The default for CRM_CURRENCY_CODE is taken from the profile option, Corporate Currency Default (ZCA_COMMON_CORPORATE_CURRENCY).
- The default for CRM_CONVERSION_RATE_TYPE is taken from the profile option, Exchange Rate Type Default (ZCA_COMMON_RATE_TYPE).
- CRM_CONVERSION_RATE is calculated using a GL API.

- CONVERSION_RATE_TYPE is updated based on a parameter to the batch program.
- CONVERSION_RATE is updated. Changes if corporate rate types change. Rate is obtained.
### Revenue Model Attribute

<table>
<thead>
<tr>
<th>Revenue Model Attribute</th>
<th>Attribute Description/Function</th>
<th>Batch Process Update</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>attributes are updated whenever the revenue is created or updated or whenever an opportunity with revenues is updated or saved.</td>
<td>using (conversion_rate_type, line_currency_code, summary_currency_code, and system date).</td>
</tr>
</tbody>
</table>

- **REVN_AMT**
- **DOWNSIDE_AMT**
- **UPSIDE_AMT**

For summary revenue amounts, these amounts are calculated as the sum of line revenue amounts. These amounts are converted to the opportunity-level currency before calculating the sum. The exchange rate stored in the CONVERSION_RATE attribute is used to perform the conversion.

- Line revenue is not updated.
- Summary revenue is recalculated.

<table>
<thead>
<tr>
<th>LAST_UPDATE_DATE</th>
<th>WHO column</th>
<th>Updated.</th>
</tr>
</thead>
</table>

| USER_LAST_UPDATE_DATE | Functional WHO column | Not updated. |

### Related Topics
- Managing Job Definitions: Highlights
- Setting Up Opportunity Revenue: Points to Consider

### Entering Daily Rates Manually: Worked Example

You are required to enter the daily rates for currency conversion from Great Britain pounds sterling (GBP) to United States dollars (USD) for 5 days for your company InFusion America Inc.

In order to load rates using the Daily Rates Spreadsheet, you need to install Oracle ADF Desktop Integration client software. Oracle ADF Desktop Integration is an Excel add-in that enables desktop integration with Microsoft Excel workbooks. Users can download the installation files from Navigator > Tools > Download Desktop Integrator Installer.

### Entering Daily Rates

1. **Navigator > Period Close.**
   
   Use the Period Close work area to link to close processes and currency process.

2. Click the **Manage Currency Rates** link.
   
   Use the Currency Rates Manager page to create, edit, and review currency rate types, daily rates, and historical rates.

3. **Click the Daily Rates tab.**
   
   Use the Daily Rates tab to review and enter currency rates.

4. **Click the Create in Spreadsheet button.**
   
   Use the Create Daily Rates spreadsheet to enter daily rates in a template that you can save and reuse.

5. **Click in the From Currency field.** Select the GBP - Pound Sterling list item.

6. **Click in the To Currency field.** Select the USD - US Dollar list item.

7. **Click in the Conversion Rate field.** Select the Spot list item.
8. Click in the **From Conversion** field. Enter a valid value: 10/1/2014.
9. Click in the **To Conversion Date** field. Enter a valid value: 10/5/2014.
10. Click in the **Conversion Rate** field. Enter a valid value: 1.6.
11. Click the **Submit** > **OK** twice.
12. Review the **Record Status** column to verify that all rows were loaded successfully.
13. Save template to use to enter daily rates frequently. You can save the spreadsheet to either a local drive or a shared network drive.
14. Optionally, edit the rates from the Daily Rates user interface or resubmit the spreadsheet.

**Related Topics**

- Using Rate Types: Examples
- Using Desktop Integrated Excel Workbooks: Points to Consider

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**Updating Currency Rates: Worked Example**

You are required to change today’s daily rates that were already entered. The rates you are changing are for currency conversion from Great Britain pounds sterling (GBP) to United States dollars (USD) for your company InFusion America. Currency conversion rates were entered by an automatic load to the Daily Rates table. They can also be entered through a spreadsheet.

**Updating Currency Rates**

1. Navigate to the Period Close work area.
   - Use the Period Close work area to link to close processes and currency process.
2. Click the Manage Currency Rates link.
   - Use the Currency Rates Manager page to create, edit, and review currency rate types, daily rates, and historical rates.
3. Click the Daily Rates tab.
   - Use the Daily Rates tab to review and enter currency rates.
4. Click the From Currency list. Select the GBP - Pound Sterling list item.
5. Click the To Currency list. Select the USD - US Dollar list item.
6. Enter the dates for the daily rates that you are changing. Enter today's date.
7. Click the Rate Type list. Select the Spot list item.
8. Click the Search button.
9. Click in the Rate field. Enter the new rate of 1.7 in the Rate field.
10. Click in the Inverse Rate field. Enter the new inverse rate of 0.58822 in the Inverse Rate field.
11. Click the Save button.

**Related Topics**

- Using Desktop Integrated Excel Workbooks: Points to Consider

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9 Setting Up Search

Setting Up Sales Cloud Search: Overview

The topics in this chapter help you maintain and optimize global search and work area search, the two principal ways of searching Oracle Sales Cloud, after you have set them up as described in the Enabling and Configuring Search chapter in the Oracle Sales Cloud Getting Started with Your Implementation guide.

The topics in this chapter cover:

- Turning on automatic alphabetic sorting of lists in the account, contact, and household work areas
- Periodically optimizing work area searches and modifying search behavior
- Activating global search on custom objects or deactivated objects
- Changing the behavior and appearance of automatic suggestions in global search

Prerequisite Setups to Enable Search

You must complete the setup tasks outlined in the following table to enable the two searches. Detailed steps are provided in the Enabling and Configuring Search chapter of the Oracle Sales Cloud Getting Started with Your Implementation.

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

**Related Topics**

- Oracle Sales Cloud Getting Started with Your Implementation guide

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## Work Area Search

### Enabling Alphabetic Sort in Work Area Lists: Procedure

You can enable automatic alphabetic sort of the lists in the Account, Contact, and Household work areas by setting the system profile options listed in the following table to **Yes**. Because sort may affect application performance with large data sets, it is disabled by default.

<table>
<thead>
<tr>
<th>Profile Option Name</th>
<th>Profile Option Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sort Account Name</td>
<td>ZCA_LM_ACCOUNT_SORT</td>
</tr>
<tr>
<td>Sort Contact Name</td>
<td>ZCA_LM_CONTACT_SORT</td>
</tr>
<tr>
<td>Sort Household Name</td>
<td>ZCA_LM_HOUSEHOLD_SORT</td>
</tr>
</tbody>
</table>

**Setting the Profile Options**

To enable automatic alphabetic sort of the lists in the Account, Contact, and Household work areas, set the system profile option as follows:

1. Sign in as a setup user and navigate to the Setup and Maintenance work area.
2. Search for the Manage Administrator Profile Values task.
3. Click the task name link in the search results.
   
   The Manage Administrator Profile Values page appears.
4. Search for one of the profile options by name or by code.
   
   The application displays the profile option information.
5. In the Profile Values section, select **Yes** from the **Profile Value** list.
6. Click **Save and Close**.
Optimizing Search Indexes to Speed Up Work Area Searches

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

1. While signed in as a setup user, open the Optimize CRM Search Indexes for CRM Objects task from the implementation project. Alternatively, you can run this process using the following steps:
   a. In the Navigator, click Scheduled Processes under the Tools heading. The Schedule Processes window appears.
   c. Make sure the Job option is selected.
   d. Enter optimize database search in the Name field and press Return. The Schedule New Processes window displays the process name.
   e. In the Schedule New Processes window, click OK. The Process Details window appears.

2. Click Advanced.
3. On the Schedule tab, select the Using a schedule option.
4. Select a frequency.
5. Enter an end date in the far future.
6. Click Submit.

Modifying Work Area Search Behavior

You can modify the work area search behavior by setting the profile options listed in the following table.

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZCA_MIN_SEARCH_CHARACTER</td>
<td>Sets the minimum number of characters required for searching in the work area searches. If your data volume is low, you can decrease the minimum number of characters required for search to 1. If performance is an issue, you can improve search performance by increasing the minimum number of characters required for search to 3.</td>
<td>2</td>
</tr>
<tr>
<td>ZCA_MAX_NUMBER_OF_SUGGESTIONS_TO_SHOW</td>
<td>Controls the number of suggestions that are displayed in the autosuggest window in both global search and work area search.</td>
<td>15</td>
</tr>
</tbody>
</table>
### Setting Up Search

<table>
<thead>
<tr>
<th>Profile Option Code</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZCA_LM_FIND_USE_STARTSWITH</td>
<td>Setting this profile to Y substitutes the Starts With operator for searches in the work areas. This setting requires users to enter the first characters of the name of the object they are searching for. The default Contains operator makes it possible to search for the keywords within the name, including at the beginning, middle, or end of the name.</td>
<td>N</td>
</tr>
<tr>
<td>FND_PURGE_RECENT_ITEMS</td>
<td>The number of days a search remains available as a suggestion in the recent items list. For example, the default value of 60 days means that when you start typing the name of an object in a work area search, the recent items list displays any matching items you searched on within the last 60 days.</td>
<td>60</td>
</tr>
<tr>
<td>ZCA_MIN_CHARS_NEW_SUGGESTIONS</td>
<td>The minimum number of characters that must be typed before recent items suggestions are triggered.</td>
<td>3</td>
</tr>
</tbody>
</table>

### Setting the Profile Options

1. Sign in as a setup user and navigate to the Setup and Maintenance work area.
2. Search for the Manage Administrator Profile Values task.
3. Click the task name link in the search results.
   
   The Manage Administrator Profile Values page appears.
4. In the Search: Profile Option region, **Profile Option Code** field, enter the code.
5. Click **Search**.
6. Make your changes.
7. Click **Save and Close**.

### Customizing Record Set Values: Procedure

You can customize the values which appear in the **Record Set** field list. Each record set value restricts a search to a subset of records. If a value does not apply to your implementation, for example, then you can remove the value from the list by entering an end-date. If you do not use sales teams or sales territories, then you can remove all of the values that restrict the search by sales team or by territory.

#### Customizing Record Set Lookup Values

1. Sign in as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the **Manage Standard Lookups** task.
The Manage Standard lookups page appears.

3. In the **Meaning** field, enter %Record Set%.
4. Click **Search**.
5. Select the Lookup Type you want to customize in the search results.
6. You can customize the values in the Lookup Codes region.

You can perform one or more of the following customizations, depending on the lookup type:

- Change the wording the user sees in the list by editing the **Meaning** field.
Changing the meaning does not affect application functionality.

- Remove a value from use by entering an end-date.
- Change the display sequence.

7. Click **Save and Close**.

### Global Search

**Activating Global Search for Custom Objects and Deactivated Application Objects: Procedures**

Oracle activates global search on all application objects where search is available. Use this procedure to activate search on any objects you deactivated in the past or for custom objects you created. You can activate search only on custom objects, not on custom child objects.

To make an application object available for global search, you must do the following:

1. Activate the object.
2. Specify the frequency with which the object will be indexed.
3. Optionally, you can modify the list and order of fields indexed in the search and displayed in the search results.

**Activating an Object for Search**

To activate an object for search, do the following:

1. While signed in as a setup user or a sales administrator, navigate to the Setup and Maintenance work area.
2. Search for the Manage Search View Objects task.
3. Click the task name link in the search results.

   The Manage Search View Objects page appears.

4. Select the object you want to enable for search.
5. Click **Activate**.

   The status for the object changes to **Active**.

   **Tip:** Make sure you deactivate any object that is not needed for global search to maximize system resources.

### Setting the Indexing Frequency and Schedule

After you have activated the object, you must specify how frequently you want the object records indexed.

Oracle recommends that you index objects daily during off-hours. You should stagger the indexing times for the different objects to minimize performance impacts.

Specifying the fields to be indexed and displayed in the search results is optional because these are already set up for you.

1. Select the **Display Name** link of the object.

   The Edit Search View Object page appears.

2. In the Index Schedule region, select the **Frequency Type** and enter the number of days between index runs and the time, if appropriate. Oracle recommends staggering the indexing schedule to maximize available system resources.

3. You can change which fields the application indexes and which fields display in search results as described in the Specifying Which Fields Are Indexed and Displayed in Search Results section.

4. When you are done, click **Save and Close**

   The application returns you to the Manage Search View Objects page where you can monitor the status of the index generation for each object.
The first time your scheduled indexing process runs or any time you modify the list of fields in the object, the application generates a complete index of all the existing records. Subsequently, the process indexes only records that have changed.

If you end up with many inactive records in your system over time, you can improve the efficiency of your searches by periodically regenerating the full index. This can be accomplished by selecting the object and clicking Full Reindex.

Specifying Which Fields Are Indexed and Displayed in Search Results

In the Edit Search View Object page, you can also change which fields the application indexes and which fields display in search results. You will want to add any custom fields you want to enable for searching, for example.

- The **Title** and **Fixed Content** fields let you specify which fields are displayed in search results and in what order.
  - **Title** is the linked heading of each search result.
  - **Fixed Content** is the text which appears under the heading.

In the following example, the titles starting with the word **Opportunity:** are links which permit users to drill down to the record. The rest of the fields are the fixed content.

![Search Results](image)

- The **Body** field lists the fields that are indexed by the application. The most relevant fields are displayed in the search results, space permitting. While the **Body** field includes all of the standard fields for indexing, you must add any custom fields to the list if you want them available for searches.

To make changes, click **Edit** (the pencil icon) and make your changes in the Edit Search View Object window.

**Related Topics**

- Enabling the Global Search Profile Option

- Changing the Behavior of Global Search Automatic Suggestions
Setting Global Search Configurations as Enabled or Default: Examples

Each global search configuration contains settings for the global search, and a configuration can apply to specific pages or applications. Use the Manage Global Search Configurations page to enable or disable configurations, and select the one to use as the default. The following scenarios explain which configurations actually apply to the global search, depending on the configurations that you enable or set as default.

Predefined Default

The predefined Default configuration is always enabled and set as a default. This configuration is the working default unless a custom global search configuration is also set as a default. In this scenario, you don’t enable any other configuration, so this Default configuration applies to the global search on all pages, in all applications.

Custom Default

You create a custom global search configuration that applies to page A and application B. Later, you set your configuration as the default. Only this custom configuration and the predefined Default configuration are enabled. Both are set as default.

The result is that:

- Your custom configuration overrides the predefined Default one and becomes the working default.
- Even though you defined your custom configuration to apply to page A and application B, it now actually applies to all pages and all applications. This is because your configuration is the working default, and no other configuration is enabled.

Specific Pages or Applications

You’re using either the predefined Default configuration or a custom configuration as the default. You also enable:

- **Configuration 1:** Applies to application A
- **Configuration 2:** Applies to application B and a few pages in application A

The result is that:

- Configuration 1 applies to all pages in application A, except the few pages that use configuration 2.
- Configuration 2 applies to all pages in application B, plus the few pages in application A.
- The default configuration applies to all other applications and pages.

Creating Global Search Configurations: Procedure

Predefined global search configurations control how the global search behaves and looks. You can’t edit these configurations, but you can duplicate them and edit the copies, or create your own from scratch.

Creating a Configuration

Follow these steps:

1. Open the Setup and Maintenance work area, and go to the Manage Global Search Configurations task.
2. Click **Create**, or select a row and click **Duplicate**.
Note: You can’t delete a configuration after you create it, but you can disable it.

3. For the short name (identifier for your configuration), enter an alphanumeric code with uppercase letters and no spaces.
4. Enter a user-friendly name and description for the configuration.
5. Select the Default check box if you want to use your configuration as the default instead of the predefined Default configuration. If another custom configuration was already set as the default, then your configuration becomes the new custom default.
6. Select a product family if the configuration is for applications or pages within a specific family. Otherwise, select Common.
7. If you’re creating a duplicate, click Save and Close. To go on to the next steps and define more settings, select your configuration and click Edit.
8. Enter a module within the product family you selected. If you selected the Common family, then select the Oracle Middleware Extensions for Applications module.
9. Use the tabs to define your configuration:
   - Autosuggest: Determine what’s available to users in the global search autosuggest, as well as how the autosuggest looks and behaves.
   - Search Field: Control the search field in the global area and in the search results dialog box.
   - Search Results: Enable or disable saved and recent searches, select the search categories available to users, and define settings for filters.
   - Pages: Indicate the applications or pages that this global search configuration applies to.
10. Save your work.

Related Topics
- Modules in Application Taxonomy: Explained

Setting Up the Autosuggest for the Global Search: Procedure

Use global search configurations to determine what’s available to users in the autosuggest. You select the suggestion groups to include in configurations. The configurations also determine how the autosuggest looks and behaves.

Prerequisite
Open the Autosuggest tab in the Create or Edit Global Search Configuration page.

Defining the Content

To select suggestion groups and determine how they’re displayed in the autosuggest:

1. In the Suggestion Group section on the Autosuggest tab, move the groups you want to include into the Selected Groups pane.
   
   The Enabled column in the Available Groups pane indicates if the group is defined (on the Manage Suggestion Groups page) to be displayed by default or not in the autosuggest.

2. In the Enabled column in the Selected Groups pane, select one of the following values. The Displayed by Default column shows the resulting behavior in the autosuggest, based on what you select in the Enabled column.
Note:
- **Inherit:** In the autosuggest, the group is displayed or hidden by default depending on what’s defined for the group.
- **Yes:** The group is displayed by default, no matter what’s defined for the group.
- **No:** The group is hidden by default, no matter what’s defined for the group.

3. Order the selected groups as you want them to appear in the autosuggest.
4. Above the Suggestion Groups section, select the **Enable personalization of search groups** check box if you want to allow users to override your configuration. Users can hide, show, and reorder suggestion groups for their autosuggest.

Tip: Click the **Manage Suggestion Groups** button at any time to edit or create suggestion groups. When you return to the Autosuggest tab, click **Refresh** to reflect the changes you made to suggestion groups.

Defining the Appearance
Optionally define settings in the Appearance section on the Autosuggest tab:

- **Show Suggestion Group Headings:** Select this option to display suggestion group headings (text and icon) in the autosuggest. Even if you do so, if a group is defined on the Manage Suggestion Groups page to not show headings, then its heading won’t be displayed.

- **Show Icons:** Select this option to display icons next to suggestions in the autosuggest.

- **No Suggestions Message:** Enter the message that appears when no suggestions match the user’s search term. If you leave this field blank, then no autosuggest or anything at all appears when there are no matches.

Defining the Behavior
Optionally define settings in the Behavior section on the Autosuggest tab:

- **Show Top Suggestions:** Enable this option to display suggestions in the autosuggest as soon as the user clicks in the search field, even without entering a search term. For example, the last few pages the user opened would appear as suggestions under the Recent Items group.

- **Minimum Characters for Autosuggest:** Enter the number of characters that users must enter in the search field before matching suggestions appear in the autosuggest.

- **Maximum Number of Suggestions:** Enter the maximum number of suggestions to be displayed across all suggestion groups. This total is distributed as equally as possible among the groups.

Disabling Saved Searches and Recent Searches for the Global Search: Points to Consider

Global search configurations determine if saved searches and recent searches are enabled in the global search. Consider the following points when you use disable either. In the Create or Edit Global Search Configuration page, open the Search Results tab and use the Saved and Recent Searches section.
Disabling Saved Searches
If you disable saved searches:

- You disable the Save button in the search results dialog box, so users can’t create or edit saved searches for global search.
- You’re not disabling the Saved Searches suggestion group. Users can still see any applicable saved searches in the global search autosuggest.

Disabling Recent Searches
If you disable recent searches:

- The application isn’t saving recent searches.
- You’re not disabling the Recent Searches suggestion group. Users can still see in the autosuggest any applicable searches that they recently ran before you disabled recent searches.

Setting Up Filters for the Global Search: Procedure
To determine how users can filter their search results, define the appropriate settings when you create or edit global search configurations. You can set up search categories so that users can limit the scope of their search to begin with, or refine their search results.

Prerequisite
Open the Search Results tab on the Create or Edit Global Search Configuration page.

Setting Up Categories to Narrow Search Scope
To let users select the categories to search on before running the search:

1. In the Filters section, enable personalization of search categories.
2. In the Search Categories section, select the categories that users can search on. If you don’t select any, then every category is available to users.

Setting Up Categories as Search Result Filters
To let users filter search results based on category:

1. In the Filters section, select the check boxes to show subcategories, facets, or both. Categories are always displayed. Subcategories are an additional level of filters below categories, and facets are a level below categories.
2. Select a filter display style so that the list of all available category names are displayed:
   - **Inline**: In the Filters pane in the search results
   - **LOV**: In a Categories dialog box that users can open from the Filters pane
3. In the Search Categories section, select the categories to use as filters. This is the same set of categories to be used for personalization. If you don’t select any, then every category is available to users.

Setting Other Options for Filters
You can also use the Filters section to:

- **Show Hit Counts**: Show the number of search results that match each filter value
• **Enable Clear All Filters:** Allow users to clear all filters with one click of a button

In the Last Updated Date Filters section, select the criteria to use as filters, based on the last update date. If you don’t select any, then every date filter is available to users.

### Specifying the Pages or Applications That a Global Search Configuration Applies To: Procedure

As part of defining your global search configuration, you can specify the pages or applications (or both) that your configuration applies to. If you want your configuration to apply to all pages in all applications, then skip these steps.

#### Prerequisites

If you want the global search configuration to apply to specific applications, you need to find the application short name.

1. Open the Setup and Maintenance work area and go to the Manage Taxonomy Hierarchy task.
2. Expand the Oracle Fusion node.
3. Select the row (with the Application module type) for your application, and click **Edit Module**.
4. In the Application Details section, see the **Application Short Name** column and note down the value to use as the application short name.

#### Adding Pages or Applications

Follow these steps:

1. On the Create or Edit Global Search Configurations page, open the Pages tab.
2. Click the **Create** icon.
3. In the **View Type** column, indicate if the configuration applies to a specific page or application.
4. Enter a view ID to identify the page or application:

   - **Tip:** You can use % as a wildcard for the page or application value, such as **Example%** for all pages that start with **Example**.
     - **Page:** Enter the last part of the URL you get when you open that page. For example, enter **ExamplePage** from the URL `http://exampleServer/homePage/faces/ExamplePage`.
     - **Application:** Enter the application short name with a wildcard at the end, for example **HomePageApp%**.
5. Add more pages or applications as needed.

#### Related Topics

- **Modules in Application Taxonomy: Explained**

### Managing Alternate Words for Global Search: Points to Consider

Use the Manage Applications Core Alternate Words task in the Setup and Maintenance work area to maintain a list of search terms that users might use for the global search. For each user keyword, define a possible alternate to also search on. Consider various reasons for defining these word pairs, and also decide whether to automatically search on both terms or not.
Reasons for Word Pairs
This table provides some reasons and examples for managing alternate words.

<table>
<thead>
<tr>
<th>Purpose</th>
<th>What You Enter</th>
<th>User Input Keyword Example</th>
<th>Alternate Keyword Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Correct user typos</td>
<td>A possible typo as the user input keyword, and the correctly spelled term as the alternate keyword</td>
<td>Oracle</td>
<td>Oracle</td>
</tr>
<tr>
<td>Account for abbreviations and acronyms</td>
<td>An abbreviation or acronym and what it stands for</td>
<td>BI</td>
<td>business intelligence</td>
</tr>
<tr>
<td>Account for common variations in spelling</td>
<td>Two different ways to spell the same term</td>
<td>email</td>
<td>e-mail</td>
</tr>
<tr>
<td>Enable matches on synonyms</td>
<td>A pair of terms that are functionally similar</td>
<td>hyperlink</td>
<td>link</td>
</tr>
<tr>
<td>Help new users who are not familiar with what things are called in the application</td>
<td>The term that your users might search on as the user input keyword, and the equivalent in the application as the alternate keyword</td>
<td>concurrent program</td>
<td>scheduled process</td>
</tr>
</tbody>
</table>

*Note:* You don’t have to account for plurals or case sensitivity. For example, if you have email as a user input word, you don’t have to also add Email or emails as an input word.

Automatically Search Both Terms
For each pair of terms, use the Automatically Search Both check box to determine what happens when the user enters the input word and starts the search:

- **Yes:** The search runs and displays results based on both terms.
  
  Before you select this check box, carefully consider possible impact. For example, would users get a lot of unnecessary search results, making it harder to find what they want?

- **No:** The user sees a message and can decide to continue searching on just the input term, or to search on just the alternate term instead.

Global Search Automatic Suggestions
Suggestion Groups for the Global Search: Explained

A suggestion group is a category of suggestions that users see in the autosuggest for the global search. For example, if the user enters Report in the search field, then the Navigator suggestion group in the autosuggest shows any Navigator menu names with Report.

Managing Suggestion Groups

Each suggestion group can have a heading, for example Recent Items, as well as an icon that appears before the heading text. The icon helps users identify what the group is all about.

You can manage suggestion groups to:

- Show or hide the group by default in the autosuggest
- Enter the heading text
- Define if the heading text appears in the autosuggest or not
- Identify the image file to use as the icon

Tip: You can copy predefined suggestion groups and edit them to create customized versions.

To manage suggestion groups, open the Setup and Maintenance work area and use either the:

- Manage Suggestion Groups task
- Autosuggest tab when you create or edit global search configurations using the Manage Global Search Configurations task

Using in Global Search Configurations

Just because a suggestion group is defined to be displayed by default doesn't necessarily mean that it in fact appears in the autosuggest. Global search configurations determine which groups are included for the autosuggest, whether icons appear for the headings, and so on.

You can use a suggestion group in many or all global search configurations. And ultimately, if personalizing suggestion groups is enabled, then users can show, hide, and reorder the suggestion groups included in the global search configuration.

Changing the Heading Text and Icon for Suggestion Groups: Worked Example

This example shows how to change the icon and text for a suggestion group heading in the global search autosuggest. In this example, you start out with the predefined Default global search configuration enabled, and no custom configurations.

The following table summarizes key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which predefined suggestion group do you want to change?</td>
<td>Recent Items</td>
</tr>
<tr>
<td>What do you want the new heading text to be?</td>
<td>Recently Visited Pages</td>
</tr>
</tbody>
</table>
Decisions to Consider | In This Example
--- | ---
Which image do you want to use as the icon? | A .png file (16 by 16 pixels) that’s used on your company Web site
Do you want the new suggestion group to appear in the autosuggest by default? | Yes
Which pages should the changes apply to? | All pages

To use a new icon and heading text for the suggestion group:

- Make a copy of the predefined Recent Items suggestion group.
- Update global search configurations to use the custom suggestion group.

Duplicating the Predefined Suggestion Group

1. Open the Setup and Maintenance work area, and go to the Manage Suggestion Groups task.
2. Select the Recent Items group and click **Duplicate**.
3. In the new row, enter **RECENTCUSTOM** as the short name.
4. Change the display name to **Custom Recent Items**.
5. Change the description to **Custom version of Recent Items**.
6. With your new row still selected, click **Edit**.
7. In the Heading section, enter **Recently Visited Pages** in the **Text** field.
8. In the **Icon** field, enter the full URL to your .png file.
9. Click **Save and Close**.

Updating Global Search Configurations

1. In the Setup and Maintenance work area, go to the Manage Global Search Configurations task.
2. Select the Default configuration and click **Duplicate**.
3. Fill out the row for your new configuration, selecting the **Default** check box.
4. With the row still selected, click the **Edit** icon.
5. In the Autosuggest tab, click the **Refresh** button in the Suggestion Group section if you don’t see your custom suggestion group.
6. Move the Custom Recent Items group into the **Selected Groups** list, and move the Recent Items group out.
7. In the **Enabled** column for the Custom Recent Items Group, select **Yes**.
8. In the Appearance section, make sure that headings are set to be displayed.
9. Click **Save and Close**.

Creating Suggestion Groups for the Global Search: Procedure

For the autosuggest in the global search, you can create new suggestion groups that determine suggestions in a way that’s different from the predefined groups. Creating such suggestion groups involves developer tasks and is not applicable to Oracle Cloud implementations. After the code for the group is ready, you define the new suggestion group in the Create Suggestion Group page.

> **Note:** You can’t delete a suggestion group after you create it.
Prerequisites

Before you define the new suggestion group:

- Your developer writes code for the new suggestion group and provides you values for some of the suggestion group settings. For more information on implementing autosuggest, see the Oracle Fusion Applications Developer’s Guide.
- If you want to display an icon for the group in the autosuggest, make sure that the graphics file:
  - Can be accessed using a URL.
  - Is 16 by 16 pixels or smaller.

Creating Suggestion Groups

Follow these steps:

1. Open the Setup and Maintenance work area and open the Manage Suggestion Groups task.
2. Click Create.
3. For the short name (identifier for your group), enter a unique alphanumeric code with uppercase letters and no spaces.
4. Enter a display name for the group, which can be different from the heading that appears in autosuggest.
5. Enter a description.
6. Determine if the suggestion group should be displayed by default in the autosuggest.
7. Select a product family if the group is for business objects from a specific family. Otherwise, use Common.
8. Select a module within the product family. If the product family is Common, then use the Oracle Middleware Extensions for Applications module.
9. In the Data Source field, enter the value your developer provides to determine the records to display in this suggestion group.
10. In the Context Code and Object Type fields, enter the value your developer provides, if any.
11. In the Heading section, determine if the heading (text and icon) is visible in the autosuggest.
12. Enter the exact text to appear as the heading of this group in the autosuggest.
13. To display an icon, enter in the Icon field the full URL to the image file, or a relative URL that your developer provides if the file is stored with other application artifacts.
14. Save your changes.

Note: Global search configurations:

- Determine which suggestion groups are actually available for the global search.
- Determine whether each included group is visible by default or not in the autosuggest.
- Can hide suggestion group headings in the autosuggest, even if the group is defined to show headings.
10 Setting Up Accounts and Contacts

Customer Data Management in Oracle Sales Cloud: Overview

The customer data management setup involves reviewing and defining the configuration required to manage customer information and their business relationships.

Key Features

You can use customer data management functionality to:

- Prevent and identify duplicate data: You can identify duplicates during real-time or in a preconfigured batch. Real-time account and contact searching and matching prevents creation of duplicate data. You can identify potential duplicate data based on preconfigured matching configurations.
- Verify and standardize addresses: You can perform real-time and batch address cleansing for account or contact address information. You can verify and cleanse addresses within an import batch during import. The addresses are verified against the master geography area and cleansed. The geography validation feature can also be enabled to check if the entered address maps to the geography hierarchy data available for the country.
- Resolve duplicate data: You can merge and link duplicate records to create master records that are the single source of truth. You can de-duplicate within an import batch as well as within the entire database. Customer data management uses a data quality engine to consolidate high quality account and contact data from multiple sources, manage duplicate data, enhance data with third-party content, standardize addresses, and monitor data quality. These data quality checks ensure cleansed, enriched, and complete customer information that can be trusted by the sales team.

For more details on customer data management implementation, see the Oracle Sales Cloud - Implementing Customer Data Management guide.

Accounts and Contacts

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
• Sales Accounts: Explained
• Sales Contacts: Explained
• Sales Households: Explained
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.

Enabling Do Not Contact Functionality: Procedure

Use this procedure to set up the Do Not Contact (DNC) functionality for contacts in Oracle Sales Cloud. The DNC functionality enables you to set preference for phone, e-mail, and address of a contact. By setting the DNC functionality, you can indicate the phone, e-mail, or address that your sales representatives should not use to contact.

This procedure outlines the two scenarios of setting the DNC preferences:

- Setting up Do Not Contact preference for a contact generically
- Setting up Do Not Contact preference for a specific phone, e-mail, or address of a contact

Setting Up Do Not Contact Preference for a Contact Generically

You can set up the Do Not Contact (DNC) preference at the contact level. This sets a wide preference on all phones, e-mails, and addresses of the contact, indicating that this contact should not be contacted at all. Alternatively, you can also set the DNC preference separately for all phones, all e-mails, or all addresses of a contact.
Perform the following steps to set up the Do Not Contact preference for a contact.

1. Sign in to the application as a user with setup privileges, such as the Sales Administrator or Application Implementation Consultant.
2. Click Navigator, and select Application Composer from the Tools menu.
3. In the Application Composer tree, navigate to Standard Objects, Contact, and then Pages.
4. Ensure that the Simplified Pages tab is active.
5. In the Create Page Layouts section, select Default Layout and click the Edit icon.
6. In the Creation Layout: Default Layout page, click the Edit icon that appears next to Create Contact.
7. Select and move the following options from the Available Fields column to the Selected Fields column, depending on your requirement.

<table>
<thead>
<tr>
<th>Select and move</th>
<th>If you would want to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do Not Contact</td>
<td>Set a blanket Do Not Contact preference at the contact level. This signifies that this contact must not be contacted at all.</td>
</tr>
<tr>
<td>Do Not Call</td>
<td>Set the contact preference at the phone level for a contact.</td>
</tr>
<tr>
<td>Do Not E-Mail</td>
<td>Set the e-mail preference for a contact.</td>
</tr>
<tr>
<td>Do Not Mail</td>
<td>Set the address preference for a contact.</td>
</tr>
<tr>
<td>All Phones</td>
<td>Enable the All Phones icon in the Create or Edit Contact page.</td>
</tr>
<tr>
<td>All E-Mails</td>
<td>Enable the All E-Mails icon in the Create or Edit Contact page.</td>
</tr>
</tbody>
</table>

8. Click Save and Close.
9. Click Done.

**Note:** If you want the Do Not Contact option to appear in the Create Contact page, then you must perform steps 1 to 9.

10. In the Details Page Layouts section, select Default Layout and click the Edit icon.
11. In the Details Layout: Default Layout page, click the Profile icon.
12. Click the Edit icon that appears next to Summary.
13. Select and move the Do No Contact option from the Available Fields column and to the Selected Fields column.

**Note:** You can also move the other options such as Do Not Call, Do Not E-Mail, Do Not Mail options. Refer to the table in Step 7.
14. Click Save and Close.
15. Click Done.

**Note:** If you want the Do Not Contact option to appear in the Edit Contact page, then you must also perform steps 10 to 15.
Setting Up Do Not Contact Preference for a Specific Phone, E-Mail, or Address of a Contact

You can also set the DNC preference for a contact at a granular level, such for a specific phone, e-mail, or address, if the contact has more than one.

Setting Up Do Not Call

If a contact has multiple phone numbers, then you must first enable the All Phones option from the Application Composer. Then, you can enable the Do Not Call option for a specific phone number of the contact.

Perform the following steps to enable the Do No Call preference for a specific phone number of a contact.

1. Perform steps in the “Setting Up Do Not Contact Preference for a Contact” section to enable All Phones.
2. Navigate to Sales, and then Contacts.
3. Activate a sandbox.
4. From the login user drop-down list, select Customize Work Area Pages.
5. In the Customize Pages dialog, select the Edit button next to the Site layer, and click OK. The Editing: User Interface dialog is displayed.
6. In the Contacts page, select a contact.
7. In the Edit Contact page, click the Profile icon.
8. Click the All Phones icon.
9. In the Editing: User Interface dialog, click the Select button.
10. In the Manage All Phones dialog, click any one of the columns, such as Primary, Type, or Number columns and select the Edit Parent Component option in the dialog box.
11. In the Component Properties dialog, click the Children tab.
12. Select the Do Not Call and Reason options, and click Apply and then OK. Notice that the Do Not Call and Reason columns are now visible in the Manage All Phones dialog.
13. In the Editing: User Interface dialog, click the Design button.
14. In the Manage All Phones dialog, select the Do Not Call option for a phone number. Notice that the DNC icon is instantly enabled for the selected phone number.
15. Alternatively, select a reason from the Reason list.
16. Click OK.

Setting Up Do Not E-Mail

If a contact has multiple e-mail addresses, then you must first enable the All E-Mails option from the Application Composer. Then, you can enable the Do Not E-Mail option for an individual e-mail address of the contact.

Perform the following steps to set up the Do No E-Mail preference for a specific e-mail address of a contact.

1. Perform steps in the “Setting Up Do Not Contact Preference for a Contact” section to enable All E-Mails.
2. Navigate to Sales, and then Contacts.
3. Activate a sandbox.
4. From the login user drop-down list, select Customize Work Area Pages.
5. In the Customize Pages dialog, select the Edit button next to the Site layer, and click OK. The Editing: User Interface dialog is displayed.
6. In the Contacts page, select a contact.
7. In the Edit Contact page, click the Profile icon.
8. Click the All E-Mails icon.
9. In the Editing: User Interface dialog, click the Select button.
10. In the Manage All E-Mails dialog, click any one of the columns, such as Primary, Type, or E-Mail columns and select the Edit Parent Component option in the dialog box.
11. In the Component Properties dialog, click the Children tab.
12. Select the Do Not E-Mail and Reason options, and click Apply and then OK. Notice that the Do Not E-Mail and Reason columns are now visible in the Manage All E-Mails dialog.

13. In the Editing: User Interface dialog, click the Design button.

14. In the Manage All E-Mails dialog, select the Do Not E-Mail option for an e-mail. Notice that the DNC icon is instantly enabled against the selected e-mail.

15. Alternatively, select a reason from the Reason list.

16. Click OK.

Setting Up Do Not Mail

If a contact has multiple mailing addresses, then you must first enable Multiple Address from the Application Composer. Then, you must enable the Do Not Mail option, which is not available ready-to-use, for a specific mailing address of the contact.

Perform the following steps to enable Multiple Address and to set up the Do No Mail preference for a specific mailing address of a contact.

1. Perform steps 1 to 12 in the “Setting Up Do Not Contact Preference for a Contact” section.
2. Click Show in the Multiple Address section and click Hide in the Primary Address section.
3. Click Done.
4. Navigate to Sales, and then Contacts.
5. Activate a sandbox.
6. From the login user drop-down list, select Customize Work Area Pages.
7. In the Customize Pages dialog, select the Edit button next to the Site layer, and click OK. The Editing: User Interface dialog is displayed.
8. In the Contacts page, select a contact.
9. In the Edit Contact page, click the Profile icon. Notice that the Multiple Addresses table is enabled in the Addresses section.
10. In the Editing: User Interface dialog, click the Select button.
11. In the Addresses section, click any one of the columns, such as Primary, Type, or Address and select the Edit Parent Component option in the dialog box.
12. In the Component Properties dialog, click the Children tab.
13. Select the Do Not Mail and Reason options, and click Apply and then OK. Notice that the Do Not Mail and Reason columns are now visible in the Addresses section.
14. In the Editing: User Interface dialog, click the Design button.
15. In the Multiple Addresses table of the Addresses section, select the Do Not Mail option for an address. The DNC icon is instantly enabled for the selected address.
16. Click Save.

Enabling Multiple Addresses: Explained

Accounts, contacts, households, and partners automatically display a primary address region. However, you can change this to instead display a table that lists multiple addresses.
Where Does Address Information Display?
Address details for accounts, contacts, households, and partners display on their respective Profile subtabs.

For example, in the screenshot below, you can see the Primary Address region which displays on the Profile subtab for an account record. This is the default view of address details. Use Application Composer to change the Primary Address region to instead display the Multiple Address region.

![Edit Account: ABC Corporation... : Profile](image)

Enabling Multiple Addresses - Points to Consider
Before you enable multiple addresses, you must consider the following:

- Ensure that only one address region, Primary Address or Multiple Addresses, is shown on the Details pages layout.
- The default type for Address is bill-to. You can configure the default address type using Default Address Type for Account and Default Address Type for Contacts profile options.
- An account can have one or more sell-to addresses (or address type as sell-to). Account territory assignment is based on the primary address and the primary address can be any type, such as sell-to or bill-to.
- The default type when creating an account is Prospect. You can change the default type using the Account Type Default profile option. Similarly, you can use the Contact Type Default profile option to configure the default type when creating a contact.

Enabling Multiple Addresses
To display a list of multiple addresses in a table:

1. In Application Composer, navigate to the Pages node > Simplified Pages tab for either the account, contact, household, or partner object.
2. In the Details Page Layouts region, edit the desired custom layout.
   - If none exists, then duplicate the standard layout and edit the resulting custom layout.
3. Navigate to the Profile tab.

In the Primary Address region and Multiple Address region, you will see either a Show or Hide link.

   a. Click **Hide** to hide the region at run time.
   b. Click **Show** to show the region at run time.

For example, to enable multiple addresses, click **Hide** in the Primary Address region, and click **Show** in the Multiple Address region.
Enabling Address Usage for an Account, Contact, or Household: Procedure

You can assign the usage of the address, such as bill to, ship to, and sell to, to a party of type account, contact, or household. To assign the address usage, you must enable the **Type** field in the Create Contact page, which is not displayed by default.

Perform the following steps to enable the address usage for a contact in the Create Contact page:

1. Sign in to the application as a user with setup privileges, such as the Sales Administrator or Application Implementation Consultant.
2. Navigate to **Sales**, and then **Contacts**.
3. Create and activate a sandbox to work in.
4. From the login user drop-down list, select **Customize Work Area Pages**.
5. In the Customize Pages dialog, select the **Edit** button next to the Site layer, and click **OK**. The Editing: User Interface dialog is displayed.
6. In the Contacts page, click the **Create Contact** button.
7. Enter the first name and last name of the contact.
8. In the Editing: User Interface dialog, click the **Select** button.
9. Click the **Use account address** field and select the Edit Parent Component option in the dialog box.
10. In the Component Properties dialog, click the **Children** tab.
11. Select the **Type** option, and click **Apply** and then **OK**. Notice that the Type field is now visible in the Address region.

This figure illustrates the Component Properties dialog that appears when you click the Edit Parent Component option.

![Component Properties dialog](image)

12. In the Editing: User Interface dialog, click the **Design** button.
13. Click the **Type** drop-down list and select an address usage option, such as Bill to, Sell to, or Ship to.
14. Click **Save and Close**.
Setting Up the Mapping Service for Contextual Addresses: Points to Consider

A contextual address is marked with an orange triangle that users can click to display the address on a map. The Mapping Service for Contextual Addresses profile option determines the mapping service to use to display the map. Use the Manage Administrator Profile Values or Manage Application Toolkit Administrator Profile Values task in the Setup and Maintenance work area to set the profile option value.

Profile Option Default

By default, the Mapping Service for Contextual Addresses profile option has no value.

⚠️ Caution: Until you enter a valid value for this profile option, users get an error when they try to open a map for any contextual address.

Profile Option Value

After you find and select the Mapping Service for Contextual Addresses profile option, enter a mapping service URL in the Profile Value column, for example:

- `http://maps.yahoo.com/maps_result.php?q1=
- `http://bing.com/maps/?v=2&encType=1&where1=

You can include parameters in the URL. For example, to avoid a locator box in Google Maps, add `&iwloc=&` to the URL. So, you would enter `http://maps.google.com/maps?iwloc=&output=embed&q=` as the profile value.

Related Topics

- Setting Profile Option Values: Procedure

Enabling White Space Analysis Report Tab in Accounts: Procedure

Once you have the required cloud service license, you can access the white space analysis report from a tab under Accounts. The tab is not enabled in the shipped product, which means that you must explicitly enable the white space analysis report tab from Accounts. You must also have some recommendations and leads created based on sales predictions rules to populate the report with data to display. If no data is available to display for the white space analysis report, a message indicates there are no leads or recommendations to display.

Enable the white space analysis report tab as follows:

1. Sign in as a sales administrator and either create a sandbox or edit an existing sandbox, and designate it as an active sandbox.

   A sandbox provides an independent development environment so that you can fully test your changes before merging them with the main application and making them available to your users.

2. Click Structure under the Tools menu.

3. Expand Sales and click Accounts.
4. Click **Tab** and update the Name, Icon, Visible, and Order for the white space analysis tab.
5. Click **Save and Close**.
6. Click the sandbox name that you created in Step 1. See the following example:

![Sandbox](image)

7. Click **More...**
8. Click **Publish**.

The white space analysis tab is now available to users from Accounts.

**Related Topics**

- Customizing the Navigator and Springboard: Overview
- How can I access the white space analysis report?
- Selecting Products for Recommendations: Points to Consider
- Managing Prediction Rules: Examples

**Making the Account Field Required for Contacts: Procedure**

By default, Oracle Sales Cloud does not require you to specify an account when you create a contact. Using customization tools, you can make the field required.

**Simplified UI**

To make the Account field required in the simplified UI:

1. Sign in as the sales administrator.
2. Navigate to **Sales Contacts**.
3. Click your username, and from the menu select **Customize Work Area Pages**.
4. In the Customize Pages dialog window, select the **Site** level and click **OK**.

   The application will be in Oracle Page Composer Design mode.
5. Click Create Contact.
6. Enter a first and last name for the contact.
7. Click **Select** from the Page Composer toolbar.
8. Click the Account field and, from the dialog box, select **Edit Component**.
9. On the Component Properties dialog box for Account, select the check box for **Required**.
10. Click Apply and click OK.

Desktop UI
To make the Account field required in the desktop UI:

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the task, Manage Customer Center Profile Options.
3. Click the ZCM_ENABLE_STANDALONE_CONTACT profile option.
4. In the Profile Value list at the site level, select No.
5. Click Save and Close.

Merging Accounts and Contacts: Explained
This topic covers how you make merge requests and the profile options to consider when making a request to merge multiple records into a single record.

Making a Merge Request
You must have at least two records to merge. You perform a merge when you want to consolidate multiple or duplicate records into a single record.

Use the landing page for accounts or contacts to submit a merge request. Oracle Sales Cloud Customer Data Hub processes all merge requests; therefore, you must implement Customer Data Hub and set the profile option Merge Request Enabled to YES to enable merging of records.

You can select the records that you want to merge and then submit a request to merge them into a single surviving record. A successful merge request results in one surviving record and the status of all other duplicate records changes to Merged.

Requesting or Bypassing Approval of Merge Request
Your merge request is directly processed or is passed on for approval to a data steward manager depending on how you have set the User Merge Requests profile option.

If the profile option is set to Y (Allow Processing Without Approval), the request bypasses the data steward manager and is directly queued up for processing. Else, the merge request goes to the data steward manager for approval or rejection.

Related Topics
- Manual Merge: Explained
- Managing Rejected Merge Requests: Explained
- Automerge: Explained

Enabling Source System Reference in Accounts: Explained
This topic covers an overview of what a source system reference is and how you can view the referenced systems of an account record.

Reference System Overview
Source system reference is a unique ID that enables you to maintain a record of the source of the data in Oracle Sales Cloud.
Oracle Sales Cloud may use data from disparate systems running on different databases. When such data is consolidated, the source system reference is maintained using a unique reference key for cross-referencing. You can query the source system using the reference key (unique ID) to get more information about an account from the source system.

The following figure illustrates the edit page of an account where you add or view reference systems.

In accounts simplified UI, you can enable the source system reference by enabling a subtab that contains such cross-references if any.

### Enabling Source System References

You use the Reference Systems subtab to view or add source systems. This tab is not enabled in the shipped product, which means that you must explicitly enable the Reference Systems subtab.

To enable the Reference Systems subtab:

1. In Application Composer, select **Common** from the **Application** list.
2. Expand **Standard Objects**.
3. Expand **Accounts**, and click **Pages**.
4. Select the Simplified Pages tab and scroll down to view the Details Page Layouts table.
   - Edit the default layout, or click the Duplicate Layout icon to duplicate and edit an existing layout.
5. On the Details Layout page, click the Reorder Subtabs icon which appears at the top of the subtabs.
In the Configure Subtabs dialog, move the Reference Systems subtab to the **Selected Subtabs** box.

7. Click **OK**, and then click **Done**.

Go to accounts simplified UI and edit a record. You can now see the reference systems subtab on the accounts UI.

**Related Topics**

- Managing Source System References: Explained

**How can I set Customer as the default account type when creating accounts in Simplified UI?**

You can set a default account type to Customer on the create account page by changing a profile option.

To change the profile option:

1. Sign in as a setup user or the sales administrator and navigate to the Setup and Maintenance work area.
2. Search for and select the task, Manage Administrator Profile Values.
3. Enter **ZCA_ENABLE_SELLTO_ADDR_CHECKBOX** in the **Profile Option Code** field.
4. Click **Search**.
5. Under the **Profile Option: Profile Values** region, set the **Profile Value** to Yes.

You have now set the default value of the account type to Customer.
Tip: To hide the Type field, use Application Composer. For more information on how to hide or show fields in simplified pages, see Oracle Sales Cloud Extending Sales.

Related Topics

- Customizing Fields in Simplified UI Pages Using Page Composer: Worked Example
- Extending Simplified Pages for Activities: Explained

Account and Contact Deduplication: How It Is Performed

Use the duplicate identification feature to identify and resolve duplicates when creating accounts and contacts. 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.

Settings That Affect Deduplication

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

- Data quality management configuration for accounts and contacts
- Exact name match profile options, as described in the following table:

<table>
<thead>
<tr>
<th>Profile Options</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZCM_ACC_DUP_NOTIFICATION</td>
<td>Show Duplicate Account Notification</td>
<td>Controls the display of the account duplicate notification page. Enabled by default.</td>
</tr>
<tr>
<td>ZCM_CON_DUP_NOTIFICATION</td>
<td>Show Duplicate Contact Notification</td>
<td>Controls the display of the contact duplicate notification page. Enabled by default.</td>
</tr>
<tr>
<td>ZCM_ACC_EXACT_NAME_MATCH</td>
<td>Exact Account Name Match</td>
<td>Controls the display of potential duplicate accounts based on an exact name match, when Oracle Enterprise Data Quality does not present duplicate accounts. Disabled by default.</td>
</tr>
<tr>
<td>ZCM_CON_EXACT_NAME_MATCH</td>
<td>Exact Contact Name Match</td>
<td>Controls the display of potential duplicate accounts based on an exact name match, when Oracle Enterprise Data Quality does not present duplicate contacts. Disabled by default.</td>
</tr>
</tbody>
</table>

Note: If data quality is not configured in your application and you require an exact name only match, then you must enable the ZCM_ACC_EXACT_NAME_MATCH and ZCM_CON_EXACT_NAME_MATCH profile options.
How Account Deduplication Is Performed

The following table describes the impact of different combinations of the account deduplication profile options:

<table>
<thead>
<tr>
<th>Show Duplicate Account Notification</th>
<th>Exact Account Name Match</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disabled.</td>
<td>Disabled.</td>
<td>The application does not display potential duplicate accounts.</td>
</tr>
<tr>
<td>Enabled.</td>
<td>Enabled.</td>
<td>When creating an account, the application shows a list of potential duplicate accounts, based on the data quality configuration or an exact name match.</td>
</tr>
<tr>
<td>Disabled.</td>
<td>Enabled.</td>
<td>The duplicate notifications page is hidden.</td>
</tr>
<tr>
<td>Enabled.</td>
<td>Disabled.</td>
<td>This is the default setting.</td>
</tr>
</tbody>
</table>

Note: Scenarios for contact-related profile options are similar to those described for accounts.

Related Topics

- Duplicate Accounts and Contacts: Overview
- Setting Up Data Quality Using Enterprise Data Quality: Explained

Customer Navigation Trees

Configuring the Customer Tree: Explained

The customer tree is a navigation tool in the Oracle Sales Cloud desktop interface. You can use it to view all the information about a customer in one location. This navigation tree displays profile, contact, team, and assessment information for all three customer types, including accounts, contacts, and households. The contact tree shows a subset of the nodes seen in the customer tree.

You can personalize the customer tree to show or hide the various nodes, as well as customize the node names and other parameters. When saved, these personalizations for this view of the tree are kept for all users of the application.

Team members with at least edit-level access or with the Sales Party Administration duty can update information on the following nodes:

- contacts
- organization chart
You can further personalize the tree; however, unless you have the Sales Party Administration duty or full-level access to the team and profile nodes, you can’t update the members of the team.

Perform the following steps to configure the customer tree:

1. In Navigator, select Setup and Maintenance, and navigate to the Manage Customer Tree task page.
2. To hide an item, or node, select it in the Tree Nodes list and clear the check box in the Details region for Account, Contact, or Household.
   You can designate one node as the default node to be displayed when you navigate to the customer center pages.
   The customer tree does not display a node for Opportunities unless the customer is an account.
3. Click Save and Close.

Manage Account and Contact Trees: Explained

The Account and Contact trees are navigation paradigms which enable quick and easy access to various related information in one central place. The tree consists of object nodes such as Profile or Contacts. These object nodes can be categorized into logical categories. Categories enable you to organize those object nodes to fit your needs, for example, the Sales category or Service category. Each implementation can customize the Account or Contact trees by showing or hiding the various nodes as required, and configuring node names and other parameters. When saved, the personalizations for this view of the tree are kept for all users of the application. Individual users will have capability to further personalize the tree as desired.

Managing Account and Contact Trees

Set these attributes for each node in the Account or Contact tree:

- **Name:** Name shown in the customer tree UI.
- **Visible:** Indicates whether the node will be visible in the tree.

> **Note:** All tree nodes that render portlets are delivered with the Visible check box unselected. To show the portlet, select the Visible check box.

- **Default:** Node shown when a user drills down into the tree.
- **Portlet:** Indicates whether the node is a portlet or a local task flow. A portlet is a non-local task flow residing in another business process. For example, when accessing the Opportunities node in the Leads pages, the Opportunities node is a portlet because the Opportunities task flow resides in the Sales applications, outside of the local Leads application. Each Oracle Sales Cloud service using the account and contact functionality is delivered with the appropriate portal information already configured and should not be changed. All tree nodes that render portlets have the Visible flag turned off. If the portlet is required to be visible, the Visible flag must be changed to show the node.

- **Parameters:** Specify input variables and values for the node. There are only three nodes that require parameters. These nodes are specifically for third-party integration: OneSource Profile, Service Requests, and Snapshot:
  - **OneSource Profile parameters:** `token=#{'OneSource token'}`
    Replace `{OneSource token}` with your OneSource access token. For example, if your OneSource token is `token`, set the OneSource Profile parameter as: `token=#{'token'}`. Or, if you do not require a token to
access OneSource, simply replace \{OneSource token\} with NULL; set the OneSource Profile parameter as:

```
Token=#{''}
```

- **Service Requests parameters**: 
  - i. Set host name to be your Siebel CRM server path, for example, HostName=#{'hostname.siebel.com/CALLCENTER_enu/start.swe'}
  - ii. Set SSLEnabled to true or false, for example, SSLEnabled=#{'false'}.
  - iii. Set UserName to be your Siebel CRM system login, for example, UserName=#{'USER'}.
  - iv. Set Password to be your Siebel CRM system password, for example, Password=#{'PWD'}.
  - v. Set System Name to be your source system name as defined in the Original System References mapping table, for example, System Name=#{'SIEBEL'}.

Example Service Requests parameter: 
```
HostName=#{'hostname.siebel.com/CALLCENTER_enu/start.swe'};SSLEnabled=#{'false'};UserName=#{'USER'};Password=#{'PWD'};System Name=#{'SIEBEL'}
```

- **Snapshot node parameter**: 
  - i. Set host name to be your Siebel CRM server path, for example, HostName=#{'hostname.siebel.com/CALLCENTER_enu/start.swe'}
  - ii. Set SSLEnabled to true or false, for example, SSLEnabled=#{'false'}.
  - iii. Set UserName to be your Siebel CRM system login, for example, UserName=#{'USER'}.
  - iv. Set Password to be your Siebel CRM system password, for example, Password=#{'PWD'}.
  - v. Set System Name to be your source system name as defined in the Original System References mapping table, for example, System Name=#{'SIEBEL'}.

Example Snapshot node parameter: 
```
HostName=#{'hostname.siebel.com/CALLCENTER_enu/start.swe'};SSLEnabled=#{'false'};UserName=#{'USER'};Password=#{'PWD'};System Name=#{'SIEBEL'}
```

The Snapshot node parameter is the same as the Service Requests node and thus needs the same parameters as those for the Service Requests node.

**How can I personalize account and contact trees?**

Personalizing the Oracle Sales Cloud account and contact trees gives you a more intuitive navigation experience. Each tree, located in the regional area of the page, is made up of object nodes such as Profile or Contacts. To personalize the tree, use the Action menu located directly above the tree or right click on any tree node, and click Manage Customer Tree in the menu dialog box. The Manage Customer Tree window will open. Select the node you wish to modify. You can change the name, whether the node is visible or not and if it should the default node that will display upon opening the tree. When you save, the customization will be associated to your user name.

**Integrations with Third Parties**

**Third-Party Integrations for Oracle Sales Cloud Customers: Explained**

You can use the Oracle Sales Cloud Account, Contact, and Household interfaces to gain a comprehensive view of your customer information. This functionality utilizes Oracle Sales Cloud data, as well as relevant third-party content.

**Third-Party Integrations for Sales Cloud Customers**

OneSource and Siebel CRM are two third-party integrations that you can configure in Oracle Sales Cloud. This topic explains how you map third-party customer data to Oracle Sales Cloud customers.
Mapping OneSource Data to Oracle Sales Cloud

You access OneSource data directly from the OneSource node on Oracle Sales Cloud Account, Contact, and Household information trees.

Oracle Sales Cloud searches for OneSource company data in the following order:

1. Look up based on the mappings defined in the \texttt{HZ\_ORIG\_SYS\_REFERENCES} table, where \texttt{orig\_system} is \texttt{ONESOURCE}.
2. Look up based on the Oracle Sales Cloud customer stock symbol, checked if no mapping is found in \texttt{HZ\_ORG\_SYS\_REFERENCES}.
3. Look up based on the Oracle Sales Cloud customer name, checked if no mapping is found by the stock symbol lookup. If multiple OneSource companies match the Oracle Sales Cloud customer name, you can choose from the list of matching OneSource companies.

Mapping Siebel CRM Service Data to Oracle Sales Cloud

You access mappings for Siebel CRM accounts, contacts, and groups to Oracle Sales Cloud customers in the \texttt{HZ\_ORIG\_SYS\_REFERENCES} table, where \texttt{orig\_system} is \texttt{SIEBEL}.

\textbf{Note:} Oracle Sales Cloud does not include licenses for OneSource and Siebel CRM. You must acquire third-party application licenses separately. If you want to enable OneSource and you have a web proxy for external HTTP(S) traffic, you must select Enable Web Proxy on the Web Proxy Configuration screen and specify your web proxy configuration. \textbf{See Also:} “Web Proxy Configuration” in the chapter “Creating a New Provisioning Plan” of the Oracle Sales Cloud Installation Guide
11 Setting Up Work Assignment

Work Assignment in Oracle Sales Cloud: Overview

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

Candidate and Work Objects

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

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

Territory-Based Assignment

After you set up your territories, territory-based assignment matches territory dimensions and attributes to work objects. You can set up territory-based assignment to be completely automated, to happen on-demand, or you can use a combination of these settings. Territory-based assignment requires that you set up your territories and resource hierarchy, set profile options to configure the behavior, and run assignment processes.

For an introduction to setting up territory-based assignment, read the Setting Up Sales Territories and Assignment chapter in the Oracle Sales Cloud - Getting Started with Your Implementation guide.

Rule-Based Assignment

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

For example, you can use rules to:

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

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

Assignment Profile Options

Each of the business objects available in assignment has its own set of profile options that allow you to further configure the application behavior.
Scheduled Processes
Scheduled processes are batch jobs that capture data and allow business objects to act on that data. You need to schedule several processes when using assignment.

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

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

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

Implementation Concepts for Assignment

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

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

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

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

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

Note: Use the Manage Sales Assignment Manager Objects task for opportunity assignment.
The predefined assignment configuration also includes the mapping sets and mappings that drive territory based assignment.

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

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

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

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

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

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

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

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

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

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

Consider these questions before creating rules.

Related Topics
• What’s the difference between rule-based and territory-based assignment?

Exporting and Importing Assignment Objects and Rules Setup Data: Explained

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

Almost all application implementations require moving functional setup data from one instance into another at various points in the lifecycle of the applications. For example, one of the typical cases in any enterprise application implementation is to first implement in a development or test application instance and then deploy to a production application instance after thorough testing. You can move functional setup configurations for assignment objects or assignment rules from one application instance into another by exporting and importing configuration packages from the Manage Configuration Packages page.

To export and import assignment setup data, you should start by defining an implementation project for the required assignment setup task:

• Manage Customer Center Assignment Objects
• Manage Sales Assignment Manager Objects
• Manage Sales Assignment Manager Rules
• Manage Sales Lead Assignment Objects
• Manage Sales Lead Assignment Rules
• Manage Service Assignment Objects
• Manage Service Assignment Rules

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

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

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

See the chapter about importing and exporting setup data in the Using Functional Setup Manager guide for more details.
Exporting and Importing Setup Data: Points to Consider

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

Consider the following points:

- If your implementation is using territory-based assignment only, then the implementation project needs to include only the Assignment Objects setup tasks.
- If your implementation is using territory-based assignment with rule filtering or rule-based assignment, the implementation project should include both the Assignment Objects and Assignment Rules setup tasks.
- If you are not sure whether your implementation is using territory or rule-based assignment, then Oracle recommends that you include both Assignment Objects and Assignment Rules setup tasks in the implementation project.
- The sequence of the tasks and business objects should remain as set by default.

The application allows you to delete assignment objects, assignment attributes, rule categories, rule sets, rules and conditions in an environment, for example test. If that setup data subsequently is exported and then imported into another environment, for example production, the data in the target database is not removed.

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

Related Topics
- Configuration Packages: Explained

Assignment Mappings

Mapping Set Components: How They Work Together

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

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

The mappings identify the dimensions, attributes, and territory filtering used in the assignment processing. Default mapping sets and their related mappings are predefined for account, lead, partner account, deal, and opportunity revenue assignment. This predefined mapping assumes that opportunities, leads, sales, partners, accounts, and deals use the same territory hierarchy.

Each predefined mapping set has between 9 and 16 mappings that determine the information on the object, such as the account industry or the sales lead product, and how each is mapped to a dimension or attribute on the territory.

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

Mapping Sets

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

Mapping Types

There are three types of assignment mapping:

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

When creating the mapping, the Function Service and Function Code are only needed if a translations function is used. The function code field is used to specify a unique identifier for the attribute, and this identifier is passed to the translation function.
An example is assigning territories to opportunity revenue lines based on the product associated with the revenue line. In this case, dimension is selected as the mapping type. The candidate object low attribute and high attribute correspond to the names of the low sequence and high sequence attributes for product on the territory. The work object low attribute and high attribute correspond to the names of the low sequence and high sequence attributes for product on the revenue line.

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

For example, consider a lead work object with a Partner Identifier attribute and the territory object with Partner ID attribute. The selection criterion is: `select Sales Lead Territories where Sales Lead Territory.Partner Identifier equals Sales Lead.Lead Partner Identifier`. The assignment engine will use this mapping data to construct a query on the candidate object that is equivalent to the selection criteria.

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

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

**Assignment Processing Using Mapping Sets and Mappings**

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

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

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

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

An indicator in the Related Candidates region controls whether to merge the matching assignment candidates identified from processing each set of mappings. This indicator is used to drive the merging of matching candidates when multiple mapping sets are used in assignment processing. If the box is checked, then the candidates are merged. The default is unchecked.
In most implementations, the predefined mapping sets are sufficient. But mapping sets can offer some flexibility if custom assignment processing is needed.

Creating Assignment Mappings: Examples

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

- Attribute mapping
- Dimension mapping
- Literal mapping

Creating an Attribute Mapping

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

1. Create the following mapping:
   - Work object - Revenue
   - Candidate object - Territory
2. Select the territory when the attribute territory line of business code is equal to the revenue line of business.
3. Enter a value for the sequence which determines the order in which the mapping is used when matching territories.

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

Creating a Dimension Mapping

You want to assign territories to opportunity revenue lines based on the product associated with the revenue line. To create a dimension mapping:

1. Select the mapping type **Dimension** and enter a sequence value, which determines the order in which the mapping is used when matching territories. The most selective dimension mapping should be given the lowest sequence number.
2. Enter the function `getDimMemberSequence` and the Service `oracle.apps.sales.territoryMgmt.territories.publicModel.util.ConsumableComponentsUtil`.
3. Enter the value **Prod** for the function code.
4. Select the candidate object **Territory**, the work object **Revenue**, and the alternate work object **Revenue**.
5. Select the candidate object low and high attributes.
   - The candidate object low and high attributes correspond to the names of the low sequence and high sequence attributes for product on the territory. For example, Dimension Sequence Low and Dimension Sequence High respectively.
6. Select the work object low and high attributes.
   - The work object low and high attributes correspond to the names of the attributes for product on the revenue line. For example, Inventory Item ID and Inventory Organization ID respectively.
When assigning territories to opportunity revenue lines based on the product, a revenue line may be for a product group instead of a product. In this case, the work object alternate low and high attributes can be used. For example, alternate work object low attribute would be set to Product Group.

If the revenue line does not contain either a product or product group, the low and high default values for the product dimension mapping can be used to match against the product dimension with the value Any. In this example, the default value low would be set to 1 and default value high to 999999999999999.

Creating a Literal Mapping

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

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

To create this literal mapping:

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

Assignment Rules

Assignment Rule Components: How They Work Together

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

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

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

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

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

<table>
<thead>
<tr>
<th>Mode</th>
<th>Use Score</th>
<th>Filters</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Matching or Territory</td>
<td>X</td>
<td>All</td>
<td>Increase Score By x for each matching or selected candidate</td>
</tr>
</tbody>
</table>
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Chapter 11
Setting Up Work Assignment

<table>
<thead>
<tr>
<th>Mode</th>
<th>Use Score</th>
<th>Filters</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applicable only if you use territory-based assignment with rule filtering.</td>
<td>All Above Minimum Score (set Minimum Score value)</td>
<td>All</td>
<td>Assigns the matching or selected candidates.</td>
</tr>
<tr>
<td></td>
<td>Random (set Number of Candidates value)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Top X (set Number of Candidates value)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Matching or Territory</td>
<td>Not applicable</td>
<td>All</td>
<td>Assigns the matching or selected candidates.</td>
</tr>
<tr>
<td>Applicable only if you use territory-based assignment with rule filtering.</td>
<td></td>
<td>Random (set Number of Candidates value)</td>
<td></td>
</tr>
<tr>
<td>Scoring</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Increase Score By x</td>
</tr>
<tr>
<td>Classification</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Set Value To x</td>
</tr>
</tbody>
</table>

Rule Category and Rule Set

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

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

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

Use Score

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

Filter Settings

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

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

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

**Rules**

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

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

**Action**

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

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

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

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

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

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

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

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

Creating Lead Qualification Rules

In this scenario, you want to create rules to classify leads as qualified if the following attributes are set as specified:

- Lead Customer is sales account.
- Lead Product is set to Is Not Blank.
- Lead Score is greater than 150.

To create a rule to classify leads as qualified:

1. Sign in to Oracle Sales Cloud as a sales administrator.
2. Navigate to the Setup and Maintenance work area.
3. Search for and navigate to the assignment configuration setup task for the relevant object:
   - For opportunity assignment, go to the Manage Opportunity Assignment Manager Rules task.
   - For sales lead and deal assignment, go to the Manage Sales Lead Assignment Rules task. This is the task used as an example in this topic.
4. In the setup task page, select the category for the appropriate assignment flow, in this case Sales Lead Qualification Rule Category.
5. Click the Add Row icon to create a rule set for the predefined rule category Sales Lead Qualification Rule Category.
6. Create a rule with the three conditions that match the attribute settings for a lead to be considered a qualified lead:
   - Lead Product: Select the lead attribute Primary Product ID. Select the Is Not Blank operator.
   - Lead Customer: Select the lead attribute Sales Account Indicator, and then select the Equals operator. Enter the value of Y.
   - Lead Score: Select the lead attribute Score, and then select the Greater Than operator. Enter the value of 150.
7. Under the Actions region, select Qualified from the Return the Candidate Value As Qualified list.

Creating Lead Scoring Rules

In this scenario, you want to create a scoring rule to:

- Increase lead scores by 150 if the lead attribute Lead Time Frame is set to 3 months.
- Increase lead scores by 100 if the following attributes for leads are set as specified:
  - Budget Status is Approved
  - Budget Amount is greater than 500000

To create this scoring rule:

1. Create a rule set for the predefined rule category Sales Lead Scoring Rule Category.
2. Create the first rule with the conditions that match the attribute settings you want a lead to have in order to add 150 to its score:
   - Choose the object **Sales Lead** and attribute **Time Frame**, and then select the **Equals** operator. Select 3 months.
   - Enter the action as **Increase the Score by 150**.
3. Similarly, create your remaining rule for the budget attributes and action to **Increase the Score by 100**.
   - Add the first condition: Choose the object **Sales Lead** and attribute **Budget Status**, and then select the **Equals** operator. Select **Approved**.
   - Add the second condition: Choose the object **Sales Lead** and attribute **Budget Amount**, and then select the **Greater Than** operator. Enter 500000.
   - Enter the action as **Increase the Score by 100**.

Creating Lead Territory Assignment Rules

Identify a single candidate territory for your sales leads in one line of business and all territories for the other. In this example, the custom field **Line of Business** is used to capture the line of business information on the lead. These rules will be used as part of the territory-based assignment with rule filtering option for leads.

To create the rules:

1. Create a rule set for the predefined category Sales Lead Territory Rule Category.
2. Select the filter type of **Random** and enter Number of Candidates of 1.
3. Create a rule with two conditions:
   - The line of business on the Sales Lead equals LOB1.
   - The territory type equals ignoring case PRIME.

   If this rule is true, only a single random matching prime territory will be assigned to the Sales Lead.

4. For the second line of business, create another rule set for the same category and select a filter type of **All**.
5. Set the work object as **Sales Lead** and the candidate object as **Sales Lead Territory**.
6. Create a rule with one condition where the line of business on the Sales Lead equals LOB2.

   If this rule is true, then all matching territories will be assigned to the Sales Lead.

Creating Matching Candidate with Scoring Rules

Assign different country specialists to opportunities in some European countries based on the country and the risk level of the Opportunity. To create matching candidate with scoring rules:

1. Create a rule set for the predefined category Sales Lead Resource Rule Category and select the **Use Score** option, the filter type of **All Above Minimum Score**, and the minimum score set to 20.
2. Create three rules each with conditions:
   - Create the first rule with the following condition and actions:
     - Select the object **Opportunity**, and then choose the attribute **Customer Country**. Select the **Equals** operator, and then select DE.
     - In the rule action, set **Increase Score By** to 20.
     - Select and add the appropriate resource.
b. Create the second rule with the following conditions:
   - Select the object as **Opportunity**, and then choose the attribute name **Customer Country**. Select the **In operator**, and then select **FR** and **UK** as condition values.
   - In the rule action, set **Increase Score By** to **20**.
   - Select and add the appropriate resource.

c. Create the third rule with the following conditions:
   - Select the object **Opportunity**, choose the attribute name **Risk Level**. Select the **Equals** operator, and then select the value **High**.
   - In the rule action, set **Increase Score By** to **20**.
   - Select and add the appropriate resource.

**Related Topics**
- What's the difference between rule-based and territory-based assignment?

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

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

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

**Using Territory-Based Assignment with Rule-Based Filtering: Example**

This topic illustrates using territory-based assignment with rule-based filtering. In this example, you find one or more matching territories and use assignment rules to filter the list of territories assigned to sales leads.

**Scenario**

Your company wants to assign new leads to the correct territory. If there is no sales channel identified on an incoming lead, then the application should determine if the lead should go to a partner or remain internal. If the deal is internal, then only the prime territories are assigned. If the deal is pushed to a partner, then a channel manager is also assigned to oversee the deal.

**Transaction Details**

Leads are the primary marketing business objects that the assignment engine processes. Territory assignment is the primary means of assigning the appropriate salespeople to the lead. Rule filtering may also be used to filter the territories, for example when the sales channel is not identified. The rule filtering is performed when the Assignment Rule for Territory-Based Lead Assignment (MKL_LEAD_ASSIGNMENT_RULE) profile option is set to use rule filtering.

In this scenario, the work object is Lead and the candidate object is Territory. The assignment is territory-based. The assignment processing finds one or more matching territories. Assignment processing then uses the rule category defined in the profile option above to determine the set of rules to use for the rule filtering.
After the territory-based assignment delivers a list of territories, the rules can fine-tune the assignment process:

1. **Rule for SALES CHANNEL Is not blank**
   a. SalesLead.Sales Channel Is not blank
   b. Action: Return matching candidates

2. **Rule for SALES CHANNEL Is blank, Assign Channel Manager**
   a. Sales Lead.Sales Channel Is blank
   b. Sales Deal.Deal Size Greater than 1,000,000
   c. Territory.Territory Type In Partner, Sales Channel Manager
   d. Action: Return matching candidates

3. **Rule for SALES CHANNEL Is blank, Assign Prime**
   a. Sales Lead.Sales Channel Is blank
   b. Sales Deal.Deal Size Lesser than 1,000,000
   c. Territory.Territory Type Equals Prime
   d. Action: Return matching candidates

**Analysis**

When the lead comes in, it must be assigned to a territory for follow-up. Based on the above rules, territory-based assignment can determine if the lead is a smaller deal that can be handled by your partners (and a Sales Channel Manager to oversee), or whether it is a larger deal that must be followed up by the internal sales force.

**Resulting Assignments**

The assignment engine first identifies the list of territories for the lead. The rules then determine who gets the deal:

1. This first rule determines if a Sales Channel value exists. If it does, then all territories identified (by way of territory-based assignment) are assigned.
2. The second rule says if there is no sales channel assigned, and the deal is under one million dollars, assign the lead to a partner and a Sales Channel Manager.
3. The final rule is used when there is no sales channel value, and the deal is greater than one million dollars, the lead is assigned to the prime (internal) territories.

**Custom Assignment**

**Custom Assignment Flows: Explained**

Assignment Manager assigns the right salespeople and their territories to core sales objects such as opportunities using territory dimensions or assignment rules.

You can configure custom assignment flows to assign a custom object or perform additional or alternative assignment processing on a standard object.
Summary of Features

The key features of custom assignment include:

- **Rule-based assignment:** Enables rule-based assignment to assign custom object records that enable the appropriate person or group of people to be assigned quickly and efficiently. Assignment rules offer a simple approach for defining the criteria for matching values on custom or standard objects with resources or territories. The ability to assign territories to custom objects using assignment rules allows you to balance sales efforts for the unique aspects of your business.

- **Automatic and batch assignment:** You can leverage an assignment service to enable the automatic assignment of new records or allow salespeople to run assignment. In addition, the Perform Assignments batch assignment process enables the assignment of custom object records in bulk.

- **Assignment Rules:** You can define assignment rules. These could be rules that match custom or standard fields on the custom or standard business object (such as lead or opportunity) with field on the territory or resource object. Or they could be rules where fields contain specific values. Alternatively, assignment rules can be defined to calculate a score for an object or set the value of a specific field if certain conditions are met.

Custom Assignment of Territories: Points to Consider

This topic explains the important points to consider while using custom assignment flows to assign territories to custom objects:

**Points to Consider**

The points to consider while using custom assignment flows to assign territories to custom objects include:

- You can assign territories to custom objects using rule-based assignment. Territory-based assignment is not supported.

- You cannot use territory coverage, such as geo or product in the assignment processing of territories to a custom object. Instead, you must use the standard fields on a territory, such as name, number, owner, along with any custom fields. Assignment processing uses the standard fields on a territory in addition to using the standard and custom fields on the custom object.

- Oracle recommends that you use Territories on Simplified UI to create and maintain territories so that the latest active territory details are available.

Publishing Assignment Changes

Publishing Assignment Information: Explained

Assignment information is available for assignment processing only when it is published. This topic explains the methods of publishing assignment information, and when each method can be used.

Assignment processing uses only published assignment configuration or rules. For example, if a new sales lead assignment rule is added, but the rule has not been published, then the next time assignment processing is performed for a sales lead, it will not use this new rule.
There are two ways to publish assignment information:

- From the Assignment Setup Task
- By running the Publish Assignment Information and Refresh Candidate Cache process

**Publishing using the Assignment Setup Task**

You can publish assignment data from any of the assignment objects and assignment rules setup tasks, such as Manage Customer Center Assignment Objects or Manage Sales Lead Assignment Rules. Navigate to the Setup and Maintenance work area to access the setup tasks.

Oracle recommends that you publish assignment information from the assignment setup task when you:

- Update assignment configuration, which includes, assignment objects, attributes, and mappings.
- Create or update assignment rules where the changes are infrequent or there is small number of assignment rules.

When you create or update assignment data or rules, you must click the **Save and Publish** button to publish all the assignment information for the application so that it is available for use in assignment processing. This submits a process to publish the assignment configuration and rules information. To monitor the status of the publish process, click the **Refresh** icon next to **Last Published Date**.

If you make updates to assignment data or rules and do not publish it, a warning icon appears next to **Last Published Date**. If the publish process fails, the warning icon remains next to **Last Published Date**.

**Publishing using the Publish Assignment Information Process**

You can run the **Publish Assignment Information and Refresh Candidate Cache** process to publish your assignment information. You can schedule this process daily, weekly, and so on, based on the frequency of changes to assignment information, including assignment rules. Consider how often the assignment data will change and how critical it is to have these changes available for use in assignment.

You can use the publish cache process when there are a large number of assignment rules (about 100 to 1000) and when there are multiple users making changes to rules at the same time.

To run this process:

1. Click **Navigator**, and click the **Scheduled Processes** link.
2. Click the **Schedule New Process** button.
3. On the Schedule New Process window, select **Publish Assignment Information and Refresh Candidate Cache** process from the **Name** list, and click **OK**.
4. On the Process Details page, select the application from the **Application** list.
5. Select the **Publish** check box.

   **Note:** The **Candidate Object** and **Owner Module** fields are not relevant for the process to publish assignment information.

6. Click **Submit**.

This process will publish all the assignment information for the selected application so that it is available for use in assignment processing. You can use the Scheduled Processes page to monitor this process and to view the log file.

**Related Topics**

- **Candidate Refresh: Explained**
Manage Sales Lead Assignment Objects

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

Defining the Automatic Assignment of Lead Team Resources: Example

Using a scheduled process, administrators can set up assignment manager to automatically assign lead team members and appropriate sales territories to leads. The scheduled process accepts criteria to determine the batch of leads to be assigned. During the rule-based assignment phase of the batch process, matching candidates are automatically added to the lead team. During the territory-based assignment phase of the batch process, territories are automatically added to the lead territory team.

This topic outlines how to set up lead assignment tasks and to schedule the tasks in sequence so that you can automate the lead resource assignment process.

Scenario

The automotive sector uses geography data and overall lead quality to periodically assign leads to automotive dealers. You can assign leads automatically by using score and rank criteria before being assigned a resource. Leads are automatically assigned through the assignment manager feature by associating assignment criteria to assignment rules. For example, leads are assigned based on the following criteria:

• Lead source
• Geography
• Lead score
• Named accounts, such as the top 20
• Industry
• Products

When partners must engage with customers to ensure a timely sales follow up, set up assignment manager to automatically assign partner leads to internal channel managers.
Manual Setup Assignment Manager Tasks
You can perform the following manual setup tasks through the assignment manager UI:

- Define lead distribution rules
- Define partner matching rules
- Define the quality parameters to assign leads for follow-up activities
- Set up lead qualification rules
- Set up lead classification rules to assign leads to specific sales channels
- Set up lead routing rules to route leads to sales resources in a selected sales channel
- Set up lead distribution rules to assign leads to a specific salesperson or a partner sales territory

Analysis
Use rule sets if you’re assigning leads by rule-based assignment. If the lead requires territory-based assignment only, then rule sets aren’t used. During a lead import, either ranking or scoring is used as the default qualification criteria. However, if scoring is used to determine the lead rank, then both lead score and lead rank can be used as criteria for assigning lead resources.

Automatic Assignment Manager Tasks in Batch Mode
To automate assigning lead resources, you must schedule and sequence the following order of tasks to occur when assignment manager runs in batch mode:

- Assign leads to a sales channel
- Route leads to sales organizations and sales territories
- Assign leads to individual salespersons or partners

You can also manually assign leads to specific internal or external resources. You can make the following selections:

- Job type
- Rule set
- Filtering criteria for selecting lead
- Scheduling option

Territory Lead Assignment: Examples
Leads are assigned to the appropriate territories based on matching lead attributes to territory dimensions. This topic provides some examples of the relationship between the assignment of sales leads to territories. It also contains examples of different dimensions used to assign sales leads to the correct sales territories.

A territory is the jurisdiction of responsibility of a sales resource over a set of sales accounts. Use territory-based assignment to assign sales territories to leads.

Assign Territories to Lead Territory Team
Assignment Manager can be set up to automatically assign sales territories to the lead using territories defined in Territory Manager. For example, a salesperson navigates to the leads list and opens the newly created lead. Using the Reassign action, the salesperson accesses the assignment manager feature and selects an option to run automatic assignment immediately to reassign the lead to the appropriate territories.
Territory-based Assignment Mapping

Territory-based assignment mappings are predetermined and are available as part of the Lead Management functionality. Predefined mappings are leveraged for matching the correct territories with each lead. For example, you can map the location attribute on the lead to the geography attribute on the territory. Any territories where the geography value matches the location of the lead is matched and assigned the lead.

Analysis

Ensure you have defined your territory boundary based on dimensions. There is only one set of mappings for a work object and candidate object combination. The mappings for various assignment scenarios (such as assignment of a territory to a lead) must be setup through a mapping that assigns appropriate sales territories to a lead territory team. If the lead needs rule-based assignment, then rule sets are used. If the lead needs territory assignment only, then the rules may not be required.

Examples of Enabling Territory Dimensions

You can enable only the dimensions that your organization requires for defining territories. The following examples illustrate different dimensions used to assign sales leads to the correct sales territories.

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geography</td>
<td>For most of your sales activities, you want to assign salespeople by city and postal code.</td>
</tr>
<tr>
<td>Account</td>
<td>You have a few key accounts that should belong to top salespeople. Use the account dimension to create territories for individual sales accounts.</td>
</tr>
<tr>
<td>Customer Size</td>
<td>One product line is suitable only for organizations above a certain size, and you have a few skilled salespeople for that product line. Use the customer size dimension to assign skilled salespeople to the larger customers for the product line.</td>
</tr>
<tr>
<td>Industry</td>
<td>You sell one type of service to telecommunications companies, another service to utilities, and a third service for insurance companies. You can create territories for each using the industry dimension.</td>
</tr>
<tr>
<td>Product</td>
<td>You sell a product line that requires salespeople to have a high degree of technical knowledge. Create separate territories for this product line.</td>
</tr>
<tr>
<td>Sales Channel</td>
<td>Your sales department prefers to engage partners as indirect sales channel, and telesales functions in addition to the direct sales force. You can create territories for these different sales channels such as telesales, direct, and indirect sales channels.</td>
</tr>
</tbody>
</table>

Lead Scoring: Example

Use a lead score only when the lead is easily quantified. You might use the score to calculate the lead rank. You can schedule when and how often to process lead scoring through assignment manager functionality. This topic provides an example of how a lead score is calculated. It also lists the data points used to form part of the overall score evaluation.
How Lead Score Is Determined

Lead scoring capability requires the rules engine to determine a numeric score based on the value of the lead attribute participating in the rule. For example, consider the following rule: If a lead contact is a high level executive, then add a score of 100. If the lead contact is an operations manager, then add a score of 50. When this rule evaluates, it determines the score of the lead based on the job title of the lead contact. After the rules engine evaluates all such rules, the result of the scoring process is the aggregate score, which is then recorded in the Lead Score attribute.

Data Points for Lead Scoring

The following data points form part of the overall score evaluation:

- All data included on the lead and primary product
- Lead source data such as campaign attributes
- All customer profile data including industry
- All contact profile data

Lead Ranking: Explained

When setting up lead management capabilities, you can predefine criteria to rank leads and automate the assignment of leads to the appropriate resource in your organization. You can define lead rank to categorize leads into buckets such as Hot, Warm, or Cool. This topic describes the following:

- Setting Up Lead Rank
- Creating Ranking Rules
- Calculating Lead Rank Based On Score

Setting Up Lead Rank

Although lead rank and lead score aren’t the same, they serve a similar purpose. You can use a score when the lead is quantified. You can then use the score to calculate the lead rank. Lead rank values are used as part of the qualification and assignment process for sales leads. Using the assignment manager feature, perform the following steps to set up lead ranks:

1. Select the predefined lead work object.
2. Select the predefined ranking candidate object.
3. Associate the ranking candidate objects with the lead work object.

▶️ Note: No predefined mapping for the rank candidate object exists in the assignment objects. Mapping is only for territory-based assignment.

4. Use the predefined objects during the creation of assignment rules (rule-based assignment).
5. Assign rules to determine the appropriate classification of a work object that provides a rank value for the lead.

Creating Ranking Rules

When a sales lead is created, a lead rank is first calculated by the assignment manager engine based on rules. The ranking classification rule set type determines the rank of the lead based on the values of the attributes on the lead. The following data points are available to help evaluate lead ranking rules:

- All data included on the lead and lead primary product data
• All customer profile data including industry and customer size classifications
• All contact profile data
• All lead qualification data

You can set up a lead rank rule as follows:

1. Create a rule set with a rule set type of Classification Rule.
2. Set the work object as lead and the candidate object as lead rank.
3. Create a rule with conditions that match the attribute settings you want a lead to have to give it a rank value. For example, you might select the Decision Maker Identified attribute name and then select the equal (=) operator.
4. Enter the value of True.
5. Create any other remaining conditions that you want, and then enter the action for your rule, such as Return the candidate value as Hot.

Calculating Lead Rank Based on a Score

You can schedule when and how often to process lead ranking where the lead rank value or score is calculated and displayed. Ranking rules, used by the assignment manager engine, determine what rank to assign to a lead. You can also create ranking rules that use the lead score as the criteria to name each range of scores with a specific rank. For example, if the lead score is between a value range of 0 and 39, you can create a rule to rank the lead as low priority. If the lead score is between a value of 40 and a value of 60, then create a ranking rule that assigns a medium rank to the lead. The assignment manager engine passes the rank value to the lead management capability and is displayed as a list. You can override the value by selecting a different predefined rank code or value from the list. You can also select the Rank option from the Actions menu to automatically assign a rank for your selected lead.

Related Topics
• Lead Scoring: Explained

Lead Ranking Rule: Example

You can define a lead rank to categorize leads into buckets such as Hot, Warm, or Cool leads. Such categorization of leads enables a salesperson to quickly prioritize leads for follow-up activities. This topic provides an example of how to create a lead rank rule.

Creating a Lead Rank Rule

Your organization wants to assign a rank of Hot to sales leads that have a set time frame and a decision maker identified. The assignment manager capability for leads has predefined the lead work object and lead candidate object. You can set up an assignment rule to determine the appropriate classification to apply a rank to all leads for your organization as follows:

1. From the Manage Sales Lead Assignment Rules page, create a rule set.
2. Select the classification rule type, Sales Lead work object, and Lead Rank as the candidate object.
3. From the Associated Rule Set Groups tab, create a rule set group and name it Ranking. You can search and select another rule set group (if one exists), to associate to the classification rule type.
4. Set the conditions for each rule that the rules engine checks during assignment processing. For example, enter the following rule conditions:
   o Object: Sales Lead Work Object
   o Attribute: Time Frame
Operator: Equals
Value: Three months

5. Click Add Row icon in Conditions and enter the following details:
   - Object: Sales Lead Work Object
   - Attribute: Decision Maker Identified
   - Operator: Equals
   - Value: True
   - Action: Return the candidate value as Hot

6. Click Save and Close.

The assignment manager engine:
- Finds the matching leads
- Executes the rules
- Assigns the rank value
- Passes the rank value onto the lead

**Related Topics**
- Lead Assignment Rules: Explained

**Assignment Reports**

**Generating Assignment Reports: Example**

You can use the Diagnostic Dashboard to generate the following reports:
- Batch Assignment Progress Report
- Batch Assignment Error Report
- Territory Dimension Data Report

This topic explains how to generate a batch assignment progress report, as an example.

Prerequisite: As a user with access to the Schedule Processes UI, such as the sales administrator, click **Navigator**, and then click **Scheduled Processes** under **Tools**. Run the batch assignment processes for sales accounts and opportunities. See the topics, Assignment Processes for Opportunities: Points to Consider and Scheduling Sales Account Assignment: Explained, for more information.

To run diagnostic reports from the Diagnostic Dashboard, the user you sign in as must have the required job or duty roles needed to access the dashboard. In Oracle Sales Cloud, the setup user created for you by the service is automatically provisioned with the required job role, Application Diagnostics Administrator (which contains the required duty roles). Therefore, you can use this setup user (or another user that you create and provision with this job role) to run the diagnostic reports. For details on how to add the duty roles to an existing user, see Doc ID 1374930.1 on My Oracle Support (support.oracle.com). This article describes how to assign user access to the Oracle Fusion Applications Diagnostic Dashboard.
Batch Assignment Progress Report: Scenario

This section describes a scenario for running the batch assignment progress report. It takes you through generating a batch assignment report and viewing the completed report.

To generate the batch assignment progress report:

1. Sign in as a user who has access to the Diagnostic Dashboard.
2. In the global area of the application, expand the menu under your user name.
3. Click Run Diagnostics Tests, under Troubleshooting.
4. On the Diagnostic Dashboard page, search for the report name you want to run. In this example, search for Batch Assignment Progress Report.
5. Select Batch Assignment Progress Report and click Add to Run.
   The Batch Assignment Progress Report is added under the Choose Tests to Run and Supply Inputs region.
6. Click the warning icon in the Input Status column, and enter the parameters in the Input Parameters page that appears.
7. Click OK.
8. Under the Choose Tests to Run and Supply Inputs region, enter a name in the Run Name field and click Run.
9. In the Confirmation dialog box, click OK.
   The status of the report appears under the Diagnostic Test Run Status region.
10. Click the completed report to open the report page.

You can now use the report for your analysis. You can follow the same procedure to generate the other assignment reports listed at the beginning of this topic.

Batch Assignment Progress Report: Explained

You can use assignment management functionality to generate batch assignment progress report. The batch assignment progress report indicates the number of records processed, unprocessed, successful or failed, and the number of records processed per minute for a process. The report provides details of assignment processing for multiple batch assignment processes and their sub-processes. You can run this report while a batch assignment process (accounts, leads, opportunities, revenues, or partner accounts) is running, or after a process has completed.

Access the Diagnostic Dashboard to generate the batch assignment progress report. The report includes two tables, one with details of the main process, followed by details of the sub-processes. The second table with sub-processes appears only if the Include Sub Process parameter is set to True.

Input Parameters

The report has the following input parameters:

<table>
<thead>
<tr>
<th>Input Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Process ID</td>
<td>The identifiers of parent ESS processes.</td>
</tr>
<tr>
<td></td>
<td>You can enter multiple process IDs.</td>
</tr>
<tr>
<td>From Date</td>
<td>Select the start date.</td>
</tr>
<tr>
<td>To Date</td>
<td>Select the end date.</td>
</tr>
</tbody>
</table>


Input Parameter | Description
--- | ---
Include Sub Processes | Select **True** to include sub-processes. The default value is **False**.

Example Report

The table below shows an example of a batch assignment progress report along with description of what each value means:

<table>
<thead>
<tr>
<th>Column</th>
<th>Sample Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Process ID</td>
<td>504</td>
<td>Identifier for the ESS process</td>
</tr>
<tr>
<td>Work Object Code</td>
<td>SalesAccount_ Work_Object</td>
<td>The code for the work object</td>
</tr>
<tr>
<td>Candidate Object Code</td>
<td>SalesAccountTerritory_ Candidate_ Object</td>
<td>The code for the candidate object</td>
</tr>
<tr>
<td>Submitted By</td>
<td>Sales_admin</td>
<td>Submitted By - user name of the person submitting the process</td>
</tr>
<tr>
<td>Process Status</td>
<td>Running</td>
<td>The status of the process, such as, Not Started, In Progress, Canceled, and so on</td>
</tr>
<tr>
<td>Process Start Time</td>
<td>11/19/12 8:48 PM UTC</td>
<td>Start Time of the process. Shows date, hours, and minutes</td>
</tr>
<tr>
<td>Process End Time</td>
<td></td>
<td>End Time of the process. Shows date, hours, and minutes</td>
</tr>
<tr>
<td>Process Elapsed Time (Minutes)</td>
<td>22</td>
<td>Number of minutes the process has been running</td>
</tr>
<tr>
<td>Records per Minute</td>
<td>10.46</td>
<td>Number of records processed per minute</td>
</tr>
<tr>
<td>Number of Sub Processes</td>
<td>10</td>
<td>The number of sub processes launched from the parent process</td>
</tr>
<tr>
<td>Number of Records</td>
<td>100000</td>
<td>Number of records in the process</td>
</tr>
<tr>
<td>Number Not Processed</td>
<td>94452</td>
<td>Number of records not yet processed</td>
</tr>
<tr>
<td>Number Successful</td>
<td>5542</td>
<td>Number of records successfully processed</td>
</tr>
<tr>
<td>Number Failed</td>
<td>6</td>
<td>Number of records failed</td>
</tr>
<tr>
<td>Failure Rate</td>
<td>0.00006</td>
<td>Number of failures divided by the Number of Items</td>
</tr>
<tr>
<td>Assignment Elapsed Time</td>
<td>21.45</td>
<td>Number of minutes the assignment processing has been running</td>
</tr>
</tbody>
</table>
You can also use the report to estimate the time it will take to complete a batch assignment process. This report provides details on the number of records completed and the number of records in progress. You can generate this report repeatedly to conduct performance analysis of the batch assignment processing.

**Batch Assignment Error Report: Explained**

You can use assignment management functionality to generate batch assignment error report. The batch assignment error report provides details of the error and warning messages generated while processing individual records during batch assignment process. The report provides a summary of the test input parameters and message details for each record that meets the input parameters. You can run this report while a batch assignment process (accounts, leads, opportunities, revenues, or partner accounts) is running, or after a process has completed.

Access the Diagnostic Dashboard to generate the batch assignment error report. The report shows the test parameters followed by two results tables. The first table provides a summary of the process, and the second table shows details of the records that meet the criteria entered when running the report.

**Report Parameters**

The report has the following input parameters:

<table>
<thead>
<tr>
<th>Input Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Process ID</td>
<td>Identifier for the parent ESS process. You can enter only a single process ID.</td>
</tr>
<tr>
<td>Assignment Status</td>
<td>Enter the status of the assignment, such as, error, succeeded, and so on. The default is error.</td>
</tr>
<tr>
<td>Work Object Public Unique Identifier</td>
<td>This is optional. The value that you enter here will depend on the Identifier Attribute of the work object being processed in a batch.</td>
</tr>
<tr>
<td>Range of Records</td>
<td>Enter the range of records in a process to report. The default value is the value set in the MOW_DTF_ERROR_REPORT_MAX_LIMIT profile option. You can change this profile option value in the Manage Administrator Profile Values setup task.</td>
</tr>
</tbody>
</table>

**Example Report**

The following is an example of a batch assignment error report:

**Process Summary**
### Setting Up Work Assignment

#### Work Object Details

<table>
<thead>
<tr>
<th>Work Object Code</th>
<th>Candidate Object Code</th>
<th>Start Time</th>
<th>End Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>SalesAccount_Work_Object</td>
<td>SalesAccountTerritory_Candidate_object</td>
<td>2013/2/11 12:13</td>
<td>2013/2/11 02:45</td>
</tr>
</tbody>
</table>

#### Process Details

<table>
<thead>
<tr>
<th>Work Object Public Unique Identifier</th>
<th>Assignment Status</th>
<th>Message Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1243213</td>
<td>Successful</td>
<td>225030 MOW_AMENG_AO_ASSERT_FAILED An error occurred while loading assignment object Sales_Account_Work_object. There is a mismatch between the view object definition in the assignment configuration and the actual view object definition used during assignment processing. Update and save the assignment object to register it with the latest view object definition.</td>
</tr>
<tr>
<td>1728224</td>
<td>Error</td>
<td>225030 MOW_AMENG_AO_ASSERT_FAILED An error occurred while loading assignment object Sales_Account_Work_object. There is a mismatch between the view object definition in the assignment configuration and the actual view object definition used during assignment processing. Update and save the assignment object to register it with the latest view object definition.</td>
</tr>
<tr>
<td>1982663</td>
<td>Successful</td>
<td></td>
</tr>
<tr>
<td>2392053</td>
<td>Successful</td>
<td></td>
</tr>
</tbody>
</table>

You can use this report to check if there were errors in the batch assignment process and if a particular work object record was processed.

### Running Lead Batch Assignment in Diagnostic Mode: Example

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. This topic provides an example of running lead batch assignment in diagnostic mode.

#### Running Batch Assignment

A sales representative of a company has to follow up on a lead but the lead has not been assigned to his territory. He has requested you, the sales administrator, to investigate the details of territory assignment. You can provide these details by running lead batch assignment in diagnostic mode.

1. Sign in to the application and select **Navigator**, and then select the **Lead Qualification** menu item.
2. Select **Lead Processing Activities** on the **Tasks** pane.
3. On the Lead Processing Activity page, click the **Create Lead Processing Activity** button.
4. On the Create Lead Processing Activity page:
   a. Select **Assignment** from the **Process Type** list.
   b. Enable diagnostic mode by checking the **Diagnostic Mode** check box.
   c. Search and select a lead. Note down the lead number value to use in a later step.
   d. Select **Immediate** from the **Schedule** list.
   e. Click **Submit**.
5. On the Confirmation dialog box, click **OK**.

Two process are submitted, one for lead territory assignment and the other for lead rule-based (or resource) assignment. Note down the identifier of the territory or resource assignment processes you are interested in.

6. Click the Refresh icon till the process has completed successfully or with an error.

7. Select the appropriate territory or rule-based assignment process, and then click the Output log icon in the **View Log** column to view details.

Open the log file in another browser window or tab.

**Note:** The log file format is designed to be viewed in a browser application. If the log file is opened in another application, such as Notepad, the format may not be optimal and the log may be difficult to read.

View the log for details of the assignment processing for the selected lead. You can use the lead number noted down earlier to search in the log file. Review the log for details of the assignment processing.

**Batch Assignment Diagnostic Log: Explained**

When you run batch assignment in diagnostic mode, an output log is generated with details of the assignment processing. You can use these details to troubleshoot any issues with territory assignment. The log helps you understand why certain leads or opportunities were not assigned to your territories as expected.

The following table provides an example of a lead batch assignment diagnostic run of territory-based assignment with rule filtering for a lead. It includes an explanation of each section of the log.

**Note:** Use the search feature in your log file to search on keywords, such as the error message number, for example 225203, to locate a specific section.

<table>
<thead>
<tr>
<th>Example Log File Entries</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The assignment processing is in diagnostic mode. Assignment results will not be stored. The following number of work objects will be processed: 1.</td>
<td>Provides a summary of the assignment processing and the number of work objects to be processed. You can change the number of work objects allowed to be processed in diagnostic mode through the <code>MOW_DIAG_MODE_WO_LIMIT</code> profile option. The default setting is 1.</td>
</tr>
<tr>
<td>The process 63034 started at time Wed, July 13 05:48:54 and is processing the following number of work objects: 1.</td>
<td>Enables you to confirm the objects being processed in this batch, for example territories being assigned to leads, the type of assignment processing, and the other parameters and their values relevant for this batch process. Indicates the following:</td>
</tr>
<tr>
<td>Work Object Code= Lead__Work__Object_Lead</td>
<td>• The process has started.</td>
</tr>
<tr>
<td>Candidate Object Code = Territory__Candidate__Object_Lead</td>
<td>• Work object being processed and the candidates being found.</td>
</tr>
<tr>
<td>Assignment Mode = Territory</td>
<td>• Type of assignment processing:</td>
</tr>
<tr>
<td>View Criteria Name = LeadAssignmentDiagnosticVC</td>
<td>• Territory is territory assignment</td>
</tr>
<tr>
<td>View Criteria Bind Values = BindLeadNumberDiag= 108970</td>
<td>• Matching is assignment using rules</td>
</tr>
<tr>
<td>Rule Category ID =</td>
<td>• Score is scoring</td>
</tr>
<tr>
<td></td>
<td>• Classification is ranking or qualification</td>
</tr>
<tr>
<td></td>
<td>• View criteria and bind value in leads which determine the set of leads that are included in this batch assignment process.</td>
</tr>
<tr>
<td></td>
<td>• Diagnostic mode setting.</td>
</tr>
</tbody>
</table>
Example Log File Entries | Description
--- | ---
Rule Category Name = ORA_Sales_Lead_Territory_Rule_Category  
Grouping Attribute =  
Replace Team = true  
Number of Work Objects per Sub Process = 1000  
Maximum Sub Processes per Process = 10  
Metric Logging Interval = 0  
Custom Data =  
Diagnostic Mode = true

Matching request for work object Lead_Work_Object_Lead with the identifier 108970 and candidate object Territory_Candidate_Object_Lead is in process. (MOW-225169)

Geography Identifier = 4, Customer Primary Address = 310 Park Ave SE Ste 2c5, OLYMPIA, WA 98504-0001

Party ID = 999997551079430

Lead Number = 108970

Customer ID = 999997551079430

Industry Classification code = 2900

Organization Size = VERY_SMALL

Organization Type = null

Geography Identifier = 15

Custom Account Indicator = null

Account = A. C. Network (Olympia, US)

Sales Account Type = NAMED

Sales Channel = ZPM_DIRECT_CHANNEL_TYPES

OrgTp, Classification Code = A: PS-SL; T: PS-SL

Primary Partner Identifier = null

Acct, Customer ID = 999997551079430

Prospect Account Indicator = null

Sales Account Indicator = Y

Provides a summary of the active assignment attributes and their values that will be used in the processing of this lead.

Only a subset of these attributes may be used in the assignment processing of a lead, for example lead ranking rule may only use the score and time frame attributes.

- Values for the work object.
- Attributes that are null.
- Attributes that indicate the type of lead being processed. For example, Sales Account Indicator = Y

Use this information to confirm the data values for the work object that may be used in the assignment processing.
Example Log File Entries | Description
--- | ---
Auxiliary Classification Code 2 = OFN1 | Shows the active assignment mappings that drive territory-based assignment for this lead. Also shows the value for each mapping.
Auxiliary Classification Code 3 = LANG-12113 | If an unexpected territory or set of territories has previously been assigned to the work object, then confirm that this is the information you expected to be used for this lead.
Industry Classification Code = 2900 | Assignment mapping values were retrieved. (MOW-225211)
Auxiliary Classification Code 1 = CORPORATION | Assignment mapping values were translated to sequence values. (MOW-225212)
Named Sales Account = Y | This section is relevant for Oracle Support to troubleshoot assignment issues.
Score = null | Assignment matching using mapping set Mapping Set 1 is in process. (MOW-225185)

Function Code = Geo,Geography Identifier = 4, Customer Primary Address = 310 Park Ave SE Ste 2c5,OLYMPIA, WA 98504-0001
Function Code = CSIZE, Organization Size = VERY_SMALL
Function Code = AcTyp,Sales Account Type = NAMED
Function Code = Indst, Industry Classification Code = 2900
Function Code = Acct,Customer ID = 999997551079430
Function Code = OrgTp, Classification Code = A: PS-SL; T: PS-SL
Function Code = SChnl,Sales Channel = ZPM_DIRECT_CHANNEL_TYPES

Assignment mapping values were translated to sequence values. (MOW-225212)
Function Code = CSIZE, Translated values = (7,7)
Function Code = Indst, Translated values = (26,26)
Function Code = SChnl, Translated values = (1,5)
Function Code = Acct, Translated values = (999997551079430)
Example Log File Entries

<table>
<thead>
<tr>
<th>Function Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AcTyp</td>
<td>Description</td>
</tr>
<tr>
<td>Geo</td>
<td>Description</td>
</tr>
<tr>
<td>Prod</td>
<td>Description</td>
</tr>
<tr>
<td>OrgTp</td>
<td>Description</td>
</tr>
</tbody>
</table>

Candidate matches were identified. Post processing is in progress. (MOW-225210)

The territory with the attribute name Territory Number and attribute value 5377182 was deleted because it is a parent. (MOW-225209)

The territory with the attribute name Territory Number and attribute value 282312 was deleted because of an exclusion. (MOW-225208)

The final matching candidates for mapping set Mapping Set 1 were identified. (MOW-225207)

Matching request for work object Lead_Work_Object_Lead with the identifier 142802 and candidate object Territory_Candidate_Object_Lead is in process. (MOW-225169)

If territory-based assignment with rule filtering was used, this section shows the rule set processing.
### Example Log File Entries

<table>
<thead>
<tr>
<th>Assignment processing using rule set RS12 is in progress. (MOW-225202)</th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate matches were identified. Post processing is in progress. (MOW-225210)</td>
<td></td>
</tr>
<tr>
<td>The final matching candidates for rule set RS12 were identified. (MOW-225201)</td>
<td></td>
</tr>
<tr>
<td>The following number of candidates was returned for the matching request for work object Lead_Work_Object_Lead with the identifier 142802: 63. (MOW-225170)</td>
<td></td>
</tr>
<tr>
<td>The assignment of following number of candidates to work object Lead_Work_Object_Lead with the identifier 142802 is in process: 63. (MOW-225167)</td>
<td></td>
</tr>
<tr>
<td>The existing candidates were identified. (MOW-225200)</td>
<td></td>
</tr>
<tr>
<td>Territory Number = 335</td>
<td></td>
</tr>
<tr>
<td>Territory Number = 274</td>
<td></td>
</tr>
<tr>
<td>Territory Number = 32</td>
<td></td>
</tr>
<tr>
<td>The following number of existing candidates were removed from the work object Lead_Work_Object_Lead with the identifier 142802: 13. (MOW-225181)</td>
<td></td>
</tr>
<tr>
<td>Territory Number = 274</td>
<td></td>
</tr>
<tr>
<td>Territory Number = 32</td>
<td></td>
</tr>
<tr>
<td>Territory Number = 220</td>
<td></td>
</tr>
<tr>
<td>Assignment disposition for work object Lead_Work_Object_Lead with the identifier 142802 is complete. (MOW-225166)</td>
<td></td>
</tr>
<tr>
<td>The lead assignment post processing has started. Shows the leads post processing information, such as lead reassigned indicator is set to No, and that the last assigned date and time is set.</td>
<td></td>
</tr>
<tr>
<td>The lead reassign value is set to N and assignment status is set to Assigned as part of lead assignment post processing.</td>
<td></td>
</tr>
<tr>
<td>The lead last assignment post processing date and time is set at 2016-08-11 06:31:09.0.</td>
<td></td>
</tr>
<tr>
<td>The lead assignment post processing has been completed.</td>
<td></td>
</tr>
</tbody>
</table>
### Example Log File Entries

| Assignment matching using mapping set Mapping Set 2 is in process. (MOW-225185) | Shows the progress of assignment matching for a mapping set. In this example, there are multiple active mapping sets and the next mapping set (for example, Mapping Set 2) has a conditional attribute defined. For this lead, this attribute does not contain a value, and so the territory matching for this mapping set is not needed and therefore not performed. |
| The mapping set Mapping Set 2 was skipped as the conditional attribute Primary Partner Identifier is blank. (MOW-225206) |

| Assignment matching using mapping set Mapping Set 3 is in process. (MOW-225185) | Shows the progress of assignment matching for a mapping set. In this example, there are multiple active mapping sets and the next mapping set (for example, Mapping Set 3) has a conditional attribute defined. For this lead, this attribute does not contain a value, and so the territory matching for this mapping set is not needed and therefore not performed. |
| The mapping set Mapping Set 3 was skipped as the conditional attribute Prospect Account Indicator is blank. (MOW-225206) |

| Assignment matching using mapping set Mapping Set 4 is in process. (MOW-225185) | Shows the progress of assignment matching for a mapping set. In this example, there are multiple active mapping sets and the next mapping set (for example, Mapping Set 4) has a conditional attribute defined. For this lead, this attribute does not contain a value, and so the territory matching for this mapping set is not needed and therefore not performed. |
| The mapping set Mapping Set 4 was skipped as the conditional attribute Custom Account Indicator is blank. (MOW-225206) |

| Assignment matching using mapping set Mapping Set 5 is in process. (MOW-225185) | Shows the progress of assignment matching for a mapping set. In this example, there are multiple active mapping sets and the next mapping set (for example, Mapping Set 5) has a conditional attribute defined. For this lead, this attribute does not contain a value, and so the territory matching for this mapping set is not needed and therefore not performed. |
| The mapping set Mapping Set 5 was skipped as the conditional attribute SimplifiedLeadFlag is blank. (MOW-225206) |

| The total number of work objects processed: 1. Number of work objects successfully processed: 1. Number of work objects failed: 0. (MOW-225127) | Provides summary of how many work objects were successfully processed and how many failed. |

### Running Diagnostic Test for Territory Data Used by Assignment Manager: Procedure

You can use territory management to generate a report that shows the dimension and sequence details for territory dimensions defined for territories. Review the report to troubleshoot issues in territory assignment processing. This topic explains how to run and generate this report, and shows an example of the report.
Running and Generating the Diagnostic Test Report

To run diagnostic test for territory data used by assignment manager:

1. Sign in to Oracle Sales Cloud as an administrator who has access to territories.
2. Navigate to Territories.
3. Find the territories whose data you want to view and note down the territory numbers.

Territories

Active Territories

Currency = US Dollar

<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Type</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>Prime</td>
<td>CDRM_20</td>
</tr>
<tr>
<td>APAC</td>
<td>Prime</td>
<td>CDRM_199</td>
</tr>
<tr>
<td>AutoImportQM8c660048202</td>
<td>Prime</td>
<td>CDRM_26...</td>
</tr>
<tr>
<td>AutoRFA83557439980</td>
<td>Prime</td>
<td>CDRM_20...</td>
</tr>
<tr>
<td>AutoTerr6d558848147</td>
<td>Channel S...</td>
<td>CDRM_25...</td>
</tr>
<tr>
<td>AutoTerr6d577435450</td>
<td>Channel S...</td>
<td>CDRM_43...</td>
</tr>
</tbody>
</table>
4. Click the **Run Diagnostic Tests** link from the **Settings and Actions** list.
5. On the Diagnostic Dashboard, search for **Test for Data Used by Assignment Manager**.

6. Select the test and click **Add to Run**.

7. Click the Warning icon to enter the parameters.
8. On the Input Parameters dialog box, enter the parameters.

![Input Parameters](image)

**Note:** If you are running the report for multiple territories, enter the territories without spaces. For example, CDRM_300,CDRM_123,CDRM_43. If you enter spaces, the report is run only on the first territory.

9. Enter the Run Name and click Run.

![Choose Tests to Run and Supply Inputs](image)

10. On the Test Run Submitted dialog box, click OK.
11. Click the Report icon on the relevant report row.

12. Review the report details.

For further assistance with troubleshooting, share the report with Oracle Support, along with the assignment diagnostic log files.

Purge Batch Assignment Information: Explained

Assignment management functionality enables implementations to purge data. When a batch assignment job runs, it creates data that helps with the assignment process. Once the job is completed, this data is no longer required and can be purged. The Enterprise Scheduling Service (ESS) process Purge Batch Assignment Information is used to purge the batch assignment tables based on set parameters. A batch assignment process creates data in two tables MOW_BATCH_ASMN_JOBS and MOW_BATCH_ASMN_JOB_ITEMS. When the size of the batch assignment process is huge, it creates a large number of rows in the MOW_BATCH_ASMN_JOB_ITEMS table. With time, records in these tables grow substantially, especially with large implementations. The purge batch assignment information process helps in clearing old records for successfully completed processes. The process purges data for batch assignment processes for leads, opportunities, accounts and so on.
Implementations may run this process periodically or on an ad-hoc basis. The process has only one parameter **Days to Keep**. The default value is 30.

Specify the number of days worth of assignment batch job and data to keep until the next purge. For example, if you set the parameter to 15, the process removes all rows related to successfully completed processes in the batch assignment data table that were created before 15 days from the current date.
12 Setting Up Sales 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.

Implementation Concepts for Leads

Implementing Lead Management: Critical Choices

This topic lists some of the considerations to take into account when planning your implementation of the lead management feature for Oracle Sales Cloud. No setup tasks are mandatory for this feature. You can manage the necessary configuration, integration, and metadata settings through profile options and lookups to tailor lead management functionality to match your business requirements.

Job Roles and Associated Duty Roles

The Sales Lead Processing Duty gives access to all the underlying processing duties and processing tasks. The Sales Lead Qualification duty provides access to all underlying qualification duties and qualification tasks.

Profile Option Decision Points

Profile options are configurable options that affect application operations. The following table provides you with some decisions that you must consider and the associated profile option that you access to make the appropriate change:

<table>
<thead>
<tr>
<th>Decision Question</th>
<th>Profile Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which assignment rules do you want to use to assign individual resources to the lead sales team?</td>
<td>Lead Assignment Mode</td>
</tr>
<tr>
<td></td>
<td>Assignment Rule for Rule-Based Lead Assignment</td>
</tr>
<tr>
<td>Which assignment rules do you want to use to assign a territory team to a lead?</td>
<td>Assignment Rule for Territory-Based Lead Assignment</td>
</tr>
<tr>
<td></td>
<td>Assignment Rule for Rule-Based Lead Assignment</td>
</tr>
<tr>
<td>Which lead ranking rules do you want to use?</td>
<td>Assignment Rule for Ranking Leads</td>
</tr>
<tr>
<td>Decision Question</td>
<td>Profile Option</td>
</tr>
<tr>
<td>----------------------------------------------------------------------------------</td>
<td>-----------------------------------------------------</td>
</tr>
<tr>
<td>Which lead qualification rules do you want to use?</td>
<td>Assignment Rule for Qualifying Leads</td>
</tr>
<tr>
<td>Which leads scoring rules do you want to use?</td>
<td>Assignment Rule for Scoring Leads</td>
</tr>
<tr>
<td>Do you want to display the assessment tab in the Edit Lead page?</td>
<td>Lead Assessment Enabled</td>
</tr>
<tr>
<td>Which assessment template do you want to use for lead qualification?</td>
<td>Lead Assessment Template Default</td>
</tr>
<tr>
<td>How many days should you look back when querying leads in Search?</td>
<td>Lead Query Maximum Number of Days</td>
</tr>
<tr>
<td></td>
<td>Lead Query Default Number of Days</td>
</tr>
<tr>
<td></td>
<td>Lead Query Warning Threshold Number of Days</td>
</tr>
<tr>
<td>Do you want to set the maximum number of leads that can have mass update applied in one user action?</td>
<td>Leads Mass Update Threshold Value</td>
</tr>
<tr>
<td>Do you want users to the able to add or edit products to leads?</td>
<td>Add and Edit Products to Leads Enabled</td>
</tr>
<tr>
<td>Do you require additional search criteria, other than creation date, when searching across all leads, or for searches relying on hierarchy rollups?</td>
<td>Require Additional Criteria for Lead Search Enabled</td>
</tr>
<tr>
<td>Do you want to set context-based data security policies for improved performance of lead search?</td>
<td>Lead Search Context-Based Data Security Enabled</td>
</tr>
</tbody>
</table>

**Lookup Decision Points**

Lookups enable quick selection from drop down menus. Lookups associated to lead management capabilities are incorporated into its application to speed the process of entering data into forms. You might want to change or add some of the values that are used in the lookup tables. Some of the values you can change include:

<table>
<thead>
<tr>
<th>Lookup</th>
<th>Description and Values</th>
</tr>
</thead>
</table>
| Lead Retire Reason   | Possible reasons for retiring leads. Retired leads are considered closed leads. Values include:  
|                      | Duplicate lead or No purchase interest Lead                                           |
| Reject Reason        | Possible reasons specified for rejecting leads. Rejected leads can be reassigned or retired. Values include:  
<p>| |
|                      |</p>
<table>
<thead>
<tr>
<th>Lookup</th>
<th>Description and Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duplicate lead, Failed to reach contact, and Incorrect data</td>
<td></td>
</tr>
</tbody>
</table>

**Lead Time Frame**

Lead cycle duration that usually coincides with a typical sales cycle duration for products and services offered. Values include:

- 3 months
- 6 months
- 9 months
- 12 months
- 15 months
- 18 months

**Lead Reassignment Reason**

Possible reasons specified for reassigning leads. Values include:

- No activity
- Other
- Workload

**Lead Rank**

Lead rank values used as a measure of lead quality and prioritization. Values include:

- Cool
- Hot
- Warm

**Lead Source Channel**

Source channel responsible for lead generation. Values include:

- Direct mail
- E-mail
- Fax
- Marketing Cloud
- Phone
- Sales campaign
- Sales visit
- Social
- Company website
- Wireless message
- Model-based prediction
- Rule-based prediction

**Related Topics**

- Defining the Automatic Assignment of Lead Team Resources: Example

**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.

**Sales Lead Lookups: Explained**

Lookups enable quick selection from drop-down lists and are incorporated into the lead management capability to speed the process of entering data into forms. They are also used in applications to represent a set of codes and their translated meanings. For example, a product team might store the values ‘Y’ and ‘N’ in a column in a table. When displaying those values they would want to display "Yes" or "No" (or their translated equivalents) instead. Each set of related codes is identified as a lookup type.

**Lead Lookups**

Lookup types are classified using tasks that involve a group of related lookups, such as Manage Sales Leads Standard Lookups. Each task gives you access only to certain lookup types. Use the Manage Sales Lead Standard Lookups task from the Setup and Maintenance work area to access the lookup types related to leads. Generic tasks provide access to all lookups types of a kind, such as all common lookups that are associated with the Manage Common Lookups task.

> **Note:** If the lookups in an application are available in the standards, common, or set-enabled lookups view, they are central to an application and can be easily managed. However, lookups defined in a specific application view can only be managed by following instructions provided by that application.

The following table displays lead lookup names (called lookup types in the application), the values, and the descriptions:

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Lookup Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Acceptance Status</td>
<td>• No</td>
<td>Status that indicates whether or not a lead is accepted by sales departments.</td>
</tr>
<tr>
<td></td>
<td>• Yes</td>
<td></td>
</tr>
<tr>
<td>Lead Assignment Mode</td>
<td>• Both</td>
<td>Determines whether lead assignment is based on rule-based, territory-based, or both types of rules.</td>
</tr>
<tr>
<td></td>
<td>• Rule-based assignment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Territory-based assignment</td>
<td></td>
</tr>
<tr>
<td>Lead Assignment Process Type</td>
<td>• Assignment</td>
<td>Lead processing types supported by Assignment Manager.</td>
</tr>
<tr>
<td></td>
<td>• Qualification</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Ranking</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Realign with territories</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Scoring</td>
<td></td>
</tr>
<tr>
<td>Lead Assignment Status</td>
<td>• Assigned</td>
<td>Assignment status indicating whether sales team resources are assigned.</td>
</tr>
<tr>
<td></td>
<td>• Reassigned</td>
<td></td>
</tr>
<tr>
<td>Lookup Type</td>
<td>Lookup Values</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>---------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Lead Display in Simplified Pages</td>
<td>Leads</td>
<td>Enable the display of leads in the simplified pages dashboard.</td>
</tr>
<tr>
<td>Lead Processing Activity Progress Status</td>
<td>Completed</td>
<td>Progress details indicating lead current and end processing status.</td>
</tr>
<tr>
<td></td>
<td>Completed with error</td>
<td></td>
</tr>
<tr>
<td></td>
<td>New</td>
<td></td>
</tr>
<tr>
<td></td>
<td>In progress</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Scheduled</td>
<td></td>
</tr>
<tr>
<td>Lead Processing Activity Schedule Mode</td>
<td>Immediate</td>
<td>Scheduling options for lead processing activities.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Lead Processing Repeat Frequency</td>
<td>Days</td>
<td>The time intervals between lead processing activities.</td>
</tr>
<tr>
<td></td>
<td>Months</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Weeks</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Years</td>
<td></td>
</tr>
<tr>
<td>Lead Process Scheduling Operators</td>
<td>Equal to</td>
<td>Operators used for lead processing scheduling options.</td>
</tr>
<tr>
<td></td>
<td>Greater than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Greater than or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Less than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Less than or equal to</td>
<td></td>
</tr>
<tr>
<td>Lead Reassignment Status</td>
<td>N</td>
<td>Reassignment status values for leads reassigned only by Territory Based Assignment or Resource Based Assignment jobs.</td>
</tr>
<tr>
<td></td>
<td>R</td>
<td></td>
</tr>
<tr>
<td></td>
<td>T</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Y</td>
<td></td>
</tr>
<tr>
<td>Lead Registration Approval Status</td>
<td>Approved</td>
<td>Approval status for leads registered by partners.</td>
</tr>
<tr>
<td></td>
<td>Pending approval</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Rejected</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Submitted</td>
<td></td>
</tr>
<tr>
<td>Lead Registered Status</td>
<td>No</td>
<td>Status that indicates whether or not a partner lead is registered.</td>
</tr>
<tr>
<td></td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>Lead Search Filter Record Sets</td>
<td>All records I can see</td>
<td>Record visibility filters for lead search.</td>
</tr>
<tr>
<td></td>
<td>Records in my territory hierarchy</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Records in my territory</td>
<td></td>
</tr>
</tbody>
</table>
### Set ID Leads Lookups

The following table shows the leads set-ID lookup types, the values, and the descriptions. Use the Manage Set Enabled Lookups task from the Setup and Maintenance work area to access the lookup types related to leads.

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Lookup Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Qualification Budget Status</td>
<td>• Approved</td>
<td>The approval status of a customer budget. The data is used to assess the lead qualification status.</td>
</tr>
<tr>
<td></td>
<td>• Pending</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Unknown</td>
<td></td>
</tr>
<tr>
<td>Lead Rank</td>
<td>• Cold</td>
<td>Lead rank values used as a measure of lead quality and prioritization.</td>
</tr>
<tr>
<td></td>
<td>• Hot</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Warm</td>
<td></td>
</tr>
<tr>
<td>Lead Reassignment Reason</td>
<td>• No activity</td>
<td>Possible reasons specified for reassigning leads.</td>
</tr>
<tr>
<td></td>
<td>• Other</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Workload</td>
<td></td>
</tr>
<tr>
<td>Lead Reject Reason</td>
<td>• Duplicate lead</td>
<td>Possible reasons specified for rejecting leads.</td>
</tr>
<tr>
<td></td>
<td>• Failed to reach contact</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Incorrect data</td>
<td>Rejected leads can be reassigned or retired.</td>
</tr>
<tr>
<td>Lead Retire Reason</td>
<td>• Duplicate lead</td>
<td>Possible reasons for retiring leads. Retired leads are considered closed leads.</td>
</tr>
<tr>
<td></td>
<td>• No purchase interest</td>
<td></td>
</tr>
<tr>
<td>Lead Registration Type</td>
<td>• Co-sell</td>
<td>Types of leads available for partners.</td>
</tr>
<tr>
<td></td>
<td>• Referral</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Resale</td>
<td></td>
</tr>
<tr>
<td>Lead Source Channel</td>
<td>• Direct mail</td>
<td>Source channel responsible for lead generation.</td>
</tr>
<tr>
<td></td>
<td>• E-Mail</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Fax</td>
<td></td>
</tr>
</tbody>
</table>
Deal Registration Lookups

The following table displays deal registration lookup names (called lookup types in the application), the values, and the descriptions:

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Lookup Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deal Registration Access Level</td>
<td>• Edit</td>
<td>Specifies the access level of team members for actions they can perform on deal registrations.</td>
</tr>
<tr>
<td></td>
<td>• Full</td>
<td>Full access level allows the user to update the team by adding or removing individual resources or by updating the access level for any member.</td>
</tr>
<tr>
<td></td>
<td>• View only</td>
<td></td>
</tr>
<tr>
<td>Deal Registration Assignment Mode</td>
<td>• Both</td>
<td>Determines whether deal registration assignment is rule-based, territory-based, or a combination of the two.</td>
</tr>
<tr>
<td></td>
<td>• Rule-based Assignment Only</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Territory-based Assignment Only</td>
<td></td>
</tr>
<tr>
<td>Deal Registration Reject Reason</td>
<td>• Duplicate</td>
<td>Possible reasons for rejecting a deal registration request.</td>
</tr>
<tr>
<td></td>
<td>• Ineligible Customer</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Ineligible Partner</td>
<td></td>
</tr>
<tr>
<td>Deal Registration Return Reason</td>
<td>• Incomplete Customer Information</td>
<td>Possible reasons for returning a submitted deal registration.</td>
</tr>
<tr>
<td></td>
<td>• Ineligible Product</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Insufficient Quantity</td>
<td></td>
</tr>
<tr>
<td>Deal Registration Search Filter Record</td>
<td>• All records I can see</td>
<td>Specifies record visibility filters for deal registration search.</td>
</tr>
<tr>
<td></td>
<td>• Records I own</td>
<td></td>
</tr>
<tr>
<td>Deal Registration Status</td>
<td>• Approval</td>
<td>Deal registration status values based on specific actions performed on deals registered by partners. Used to mark the milestones in the deal registration life cycle.</td>
</tr>
<tr>
<td></td>
<td>• Draft</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Expired</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Pending Approval</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Rejected</td>
<td></td>
</tr>
</tbody>
</table>
## Oracle Sales Cloud

### Implementing Marketing

#### Chapter 12

## Setting Up Sales Leads

### Related Topics
- Lookups: Explained

### Sales Lead Profile Options: Explained

Profile options are configurable options that affect application operations. Values defined at the user level take precedence over those at the site level. If a value is not defined at the user level, the site level value is used.

The effect of setting each of the sales lead profile options are described under the following broad sections:

- Lead Assignment
- Lead Qualification and Assessment
- Lead Update and Attribute Mapping
- Partner Leads and Deal Registrations
- Lead Searches

### Lead Assignment

The following table lists the profile options that affect the assignment of lead status, rank, score, resources, and territories on the lead. Before setting these profile options, you must perform the tasks listed under Configure Assignment Manager for Lead Processing setup task. From there you can review and update assignment of candidate objects such as rank, qualification status, and resources to leads.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment Rule for Qualifying Leads</td>
<td>Specify the rule to evaluate the lead and assign the lead status per rule conditions.</td>
</tr>
<tr>
<td>Assignment Rule for Ranking Leads</td>
<td>Specify the rule to evaluate the lead and assign the lead rank per rule conditions.</td>
</tr>
<tr>
<td>Assignment Rule for Rule-Based Lead Assignment</td>
<td>Specify the rule to evaluate the lead and assign the sale team resources per rule conditions.</td>
</tr>
<tr>
<td>Assignment Rule for Scoring Leads</td>
<td>Specify the rule to evaluate the lead and assign a score per rule conditions.</td>
</tr>
<tr>
<td>Assignment Rule for Territory-Based Lead Assignment</td>
<td>Specify the rule to evaluate the lead and further filter territories derived using territory-based assignment per rule conditions.</td>
</tr>
<tr>
<td>Lead Assignment Mode</td>
<td>Specify the default assignment mode type allowed during on-demand or automatic lead assignment. On-demand assignment occurs when a user selects the assign lead action in the UI.</td>
</tr>
<tr>
<td>Lead Batch Reassignment</td>
<td>Enable batch lead reassignment, in addition to lead automatic reassignment.</td>
</tr>
</tbody>
</table>

### Lookup Table

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Lookup Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deal Registration Deal Type</td>
<td>• Existing</td>
<td>Indicates the type of deal the partner is submitting for registration.</td>
</tr>
<tr>
<td></td>
<td>• New</td>
<td></td>
</tr>
<tr>
<td>• Returned</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Withdrawn</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Lead Qualification and Assessment

The following table lists the profile options that affect the qualification and assessment of leads. Before setting these profile options, you must perform the tasks listed under Configure Assessment Reference Data for Leads setup task. From there you define and manage the setup for configuring templates used for assessing and qualifying sales objects.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Assessment Enabled</td>
<td>Enable the display of Assessments, a tab containing the sets of predefined questions and answers collected to assist in evaluating the lead.</td>
</tr>
<tr>
<td>Lead Assessment Template Default</td>
<td>Specify the assessment template questionnaire to use when creating a lead assessment.</td>
</tr>
<tr>
<td>Advanced Lead Qualification Enabled</td>
<td>Enable advanced lead qualification by specifying the template name to display the collection of questions, possible answers, and questionnaire feedback.</td>
</tr>
<tr>
<td>Lead Qualification Template</td>
<td>Specify the assessment template to use for evaluating and qualifying leads.</td>
</tr>
</tbody>
</table>

### Lead Update and Attribute Mapping

The following table lists the profile options that affect the update of leads and lead-to-opportunity attribute mapping.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leads Mass Update Threshold Value</td>
<td>Specify the maximum number of leads that can be updated at once in one user action.</td>
</tr>
<tr>
<td>Add and Edit Products to Leads Enabled</td>
<td>Enable the ability to add or edit products to leads. The ability to add or edit product groups to leads is enabled by default.</td>
</tr>
<tr>
<td>Direct Lead to Opportunity Mapping</td>
<td>Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes when a direct lead is converted to an opportunity.</td>
</tr>
<tr>
<td>Display Lead Footer Region Enabled</td>
<td>Enable the display of the footer region in the Leads Overview page. The footer region is not displayed by default.</td>
</tr>
</tbody>
</table>

### Partner Leads and Deal Registrations

The following table lists the profile options that affect sales partner leads, deal registrations and deal assignments.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Registration Approval Administrator</td>
<td>Select the recipient of notifications when an approver cannot be determined, who is qualified to respond to the notification, and can modify approval configurations.</td>
</tr>
<tr>
<td>Profile Option Display Name</td>
<td>Effect</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>Lead Registration Expiration Date</td>
<td>Specify the number of days, after the lead registration creation date, used to derive the lead registration expiration date.</td>
</tr>
<tr>
<td>Resource Sales Team Access Level Default for Deal Registration</td>
<td>Specify the default access level for resources added to the deal registration sales team.</td>
</tr>
<tr>
<td>Deal Registration Query Default Number of Days</td>
<td>Specify the default number of days used to derive the last updated date range when searching for deal registrations.</td>
</tr>
<tr>
<td>Partner Lead to Opportunity Mapping</td>
<td>Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes when a partner lead is converted to an opportunity.</td>
</tr>
<tr>
<td>Deal Registration to Opportunity Mapping</td>
<td>Specify the mapping file name to be used to copy attributes while converting a Deal Registration to an Opportunity.</td>
</tr>
<tr>
<td>Assignment Rule for Rule-Based Deal Assignment</td>
<td>Specify the assignment rule that assigns resources to deal registrations. Resource members are added to the deal registration team.</td>
</tr>
<tr>
<td>Assignment Rule for Territory-Based Deal Assignment</td>
<td>Specify the assignment rule that assigns territories to Deal Registrations. Territory members are added to the deal registration team.</td>
</tr>
<tr>
<td>Deal Registration Assignment Mode</td>
<td>Specify the default assignment mode used during deal registration assignment. The mode is currently set to rule-based assignment mode.</td>
</tr>
<tr>
<td>Advanced Lead Qualification Enabled - Indirect Leads</td>
<td>Specify a default template to enable lead qualification for partner sales channel and display questions, possible answers, and questionnaire feedback in the Edit Lead user interface.</td>
</tr>
<tr>
<td>Days Prior to Deal Registration Expiration</td>
<td>Specify the number of days prior to expiration that deal registrations must be included in the predefined saved search. 30 days is the default value.</td>
</tr>
<tr>
<td>Deal Registration Default Approver</td>
<td>Select the recipient of notifications when an approver cannot be determined, who is qualified to respond to the notification, and can approve deal registrations.</td>
</tr>
<tr>
<td>Use Default Deal Registration Approval Business Process</td>
<td>Specify whether the default deal registration approval business process should be used. The default value is set to Y. Set to N if a custom process is defined.</td>
</tr>
</tbody>
</table>

**Lead Searches**

The following table lists the profile options used to manage sales lead searches.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
</table>
| Lead Query Maximum Number of Days | Specify the maximum number of days allowed when searching leads based on the creation date range.  

The value for the maximum number of days must be a positive number. If the value is not a positive number or left blank, the value of 360 days is used. |
Profile Option Display Name | Effect
--- | ---
Lead Query Default Number of Days | Specify the default number of days used to derive the creation date range for searching leads. The search criteria is derived by using the current date for the creation end date value and the profile option to derive the creation start date value.

For example, if you want leads for the last 15 days to be the default query action, then set the profile value to 15. The default creation date search criteria will have an end date for the current date and the start date will be 15 days prior to the current date. The values can be overridden in the search criteria.

The value for the default number of days must be a positive number. If the value is not a positive number or left blank, the value of 30 days is used.

This profile option can be defined at both the site and user levels.

Lead Query Warning Threshold Number of Days | Specify the number of days for the lead creation date search criteria before issuing an alert to the user.

To disable the warning, delete the profile option value.

Lead Search Context-Based Data Security Enabled | Enable context-based data security policies for improved performance of lead search. The default value is set to N.

Require Additional Criteria for Lead Search Enabled | Enable additional search criteria, other than creation date, when searching across all leads, or for searches relying on hierarchy rollups.

Related Topics
- Marketing Profile Options: Explained
- Lead Processing Activities: Explained

Lead Qualification Templates

Sales Lead Qualification Templates: Explained

Lead qualification templates enable a uniform lead-qualification process across leads. This topic provides an overview of how you can assign and use the templates as part of the lead qualification process. Using lead qualification templates, you can:

- Define lead qualification templates
- Assign lead qualification templates
- Gather lead quality information

Define Lead Qualification Templates

Qualification templates are collections of questions and answers that can be weighted and scored to evaluate the quality of gathered information about the sales lead. You use the templates to define consistent and specific qualification criteria for leads.
Assign Lead Qualification Templates

Once the qualification template is defined, you assign the template to the Lead Qualification Template profile available from the Manage Sales Lead Administrator Profile Values page. You can define more than one qualification template by assigning templates at the site level profile.

Gather Lead Quality Information

Along with other key qualification fields available in the lead, the qualification template questions are displayed on the lead Qualification tab if you have enabled the Advanced Lead Qualification profile option. Lead qualification is typically conducted through phone conversations. As you enter responses for the qualification questions, the qualification template’s weighted score is calculated and a progress bar provides immediate rating and feedback.

Defining a Sales Lead Qualification Template: Example

This topic provides an example that illustrates defining a lead qualification template to assess the basic quality of a lead.

Scenario

Your company sells alternative energy solutions to small businesses. The company employs a group of people that:

- Qualify the basic information about a lead
- Gather the necessary information required by the sales team to prepare for follow-up sales calls

Unqualified leads are generated from various sources and captures when customers have requested more information from your Web site. Before creating the qualification template, your company evaluates the following:

- Compile a set of questions that each lead qualifier is expected to ask so as to:
  - Verify the customer’s intent in requesting more information
  - Ensure a consistent and thorough communication with the customer

- Categorize a set of responses to help identify what leads to transfer to the sales team.

  For example, once the initial lead information is gathered, only leads with a greater potential for a sale are transferred to the sales team. The level of response assists the lead qualifier identify those leads with the greatest sales potential.

  To ensure the full range of possible responses, the qualification information is categorized into four basic response levels:

  - Very little information was obtained from the customer
  - A high potential of the customer working on an alternative energy project
  - Not applicable
  - Information not available

- Perform analysis of your qualification template and model the set of question responses and questions

  Question responses and questions are analyzed and modeled to effectively place the weighted score ranges into the four categories. For example, a budget that expires less than ten days may score low if the average sales cycle is greater than 10 days. However, any answer to a budgeting question has higher weight in the overall questionnaire than a question about the customer’s project team. If a qualification template’s weighted score is 90 or above, the
customer is categorized as a high potential for an energy project. Such a lead is transferred to a sales resource to pursue.

**Defining the Qualification Template**

Navigate to the Manage Assessment Templates page from the Manage Sales Lead Qualification Template implementation task. The following categories of qualification levels are entered as ratings of:

- **Little Information Available**
- **Low Project Potential**
- **Medium Project Potential**
- **High Project Potential**

Questions about the customer’s budget, time frame, decision maker, and project drive the sale potential and resulting lead rank. These questions are not included in the qualification template because the lead qualifier enters those directly in the Lead UI.

**Analysis**

Use the qualification template to effectively evaluate the customer’s project and prepare the sales team to progress the lead once the lead is qualified.

- Enter a set of questions and responses to qualify the time frame including what phase the customer’s implementation project is in.
- Gather information to meet export policies. For example, add questions about implementation projects outside of the country.
- Add questions to determine if and when a customer’s budget is due to expire.
- Identify competition by adding questions and responses about competing suppliers or in-house solutions and satisfaction levels.
- Allow a free-form response to enable the lead qualifier to capture specific customer comments about their greatest issue they are trying to solve.

Next, the weighed scores ranges are assigned to the four ratings. To provide a visual queue and feedback to the lead qualifier to guide them in their decision to update the lead as qualified, a color and feedback phrase is entered for the four ratings. The color-coded bar, score, and feedback appear at the top of each qualification questionnaire in the lead.

**Lead Qualification Template Profile**

Once the qualification template is defined, the template is assigned to the Lead Qualification Template profile available from the Manage Sales Lead Administrator Profile Values implementation task. Since there is only one business unit for your Company and only one qualification template, the template is assigned at the profile Site level.

As your company continues to grow into a global company with a broader set of business units and products, Qualification templates are created in different languages and assigned to business unit sets. The appropriate qualification template is assigned to corresponding lead qualification users through the Lead Qualification Template profile.

**Note:** The Advanced Lead Qualification Enabled profile option must be set so that you can specify the template name to use. The template displays the collection of questions, possible answers, and questionnaire feedback in the Edit Lead UI.
Configure Assignment Manager for Lead Processing

Lead Assignment Objects: Explained

The Lead Management feature provides preconfigured work objects, candidate objects, and attributes to automate the process of assigning leads to salespeople, partners, sales resources, and sales territories through the assignment manager functionality.

A work object is a business object such as a lead, or an opportunity, for which you can assign resources. You create a work object by entering its application module information, selecting its attributes to use during assignment, and associating it with one or more candidates. A candidate object is a business object such as a resource or a territory that is associated with one or more work objects. You create candidate objects to associate with one or more work objects as part of the process of creating work objects.

Lead Work Objects

A lead work object is a representation of the lead business object that requires assignment. The Lead Management feature provides the following ready to use lead work objects to ensure timely and accurate assignment of territories or resources to leads:

- Sales Lead
- Sales Lead Partner
- Sales Lead Partner Type

You can create your own custom lead work objects. You create mapping and rules to control the automatic assignment of candidates, such as resources, to the object. You select attributes of the object to define the mappings and rules. For example, you could create a rule to assign resources to leads that have a deal size of 100 dollars or more.

You can select multiple candidates and exclude other candidates when setting up leads for use by the assignment manager functionality. To assign more than one candidate, select the combined work object and candidate object view instance that captures information for the candidate.

Lead Candidate Objects

A lead candidate object usually represents a resource such as a salesperson. You can also use a candidate object to represent a virtual entity, such as a territory assigned to a lead work object. The following are ready-to-use lead candidate objects:

- Sales Lead Territory
- Sales Lead Resource
- Sales Lead Rank
- Sales Lead Qualification Status

A classification object is a special type of candidate object that is used only with classification rules to rank or qualify leads. They do not represent business objects that get assigned to a work object.
Lead Assignment Attributes
An attribute is an element in the view object defined for an assignment work or candidate object. To ensure that resources are properly assigned to business objects, you create mappings and rules. These mappings and rules employ attributes to determine the best assignments. You can select from ready-to-use attributes for those lead work and candidate objects that you want to use in your mappings and rules.

When the assignment manager engine processes a lead score request, it uses the score attribute to store the calculated score.

Related Topics
- Configuring Assignment: Critical Choices
- Using Territory-Based Assignment with Rule-Based Filtering: Example
- Lead Ranking Rule: Example
- Creating Assignment Mappings: Examples

Lead Assignment: How It Is Processed
Once lead data is cleansed, created, enriched, and scored, the leads need to be assigned. Leads can be assigned based on several criteria. For example, you can configure assignment management functionality to assign leads based on the following:

- Lead source
- Geography
- Named accounts, such as the top 20
- Industry
- Product
- Partner for working with a partner organization
- Primary sales channel associated with the lead
- Associated marketing campaign that generated the lead

Components That Affect Lead Assignment
The following lists the components that influence the assignment of leads:

- Lead work objects
- Lead candidate objects
- Attributes
- Mapping and rule conditions

How Leads Are Assigned
Leads can be assigned based on simple rules evaluation. Leads that have an associated account with an address are distributed based on territory definitions. Territory-based evaluation can be supplemented by adding filtering rules to further refine the lead assignment. Territory-based evaluation uses:

- Lead work object
- Territory candidate object data
• Mappings between the territory dimensions and lead dimensional attributes to execute the assignment processing

Lead Assignment Setup
Set up the following for assigning leads:

• Set up the necessary lead work objects, and associated candidate objects to be assigned by assignment management functionality.

Note: A default set of lead work objects and associated candidate objects are predefined.

• Set up rules and rule sets specific to your business requirements. For example, set up an assignment rule to assign leads with deal size less that a certain amount to partners.

• Set up object mappings for territory-based assignment. For example, assign a lead to those territories where Territory dimensional attributes are mapped to corresponding Lead attributes.

• Set up rules to filter territories that match the lead based on additional information on the lead. For example, set up rules to exclude prime sales territories that match leads which are unqualified.

Territory-Based Assignment
Territory-based assignment relies on an association between attributes on the lead work object and attributes on the lead territory candidate object to match the candidates to the work object. For territory-based assignment, the lead work object and lead candidate object must have attributes that share the same domain of values. The mapped attributes are used for matching appropriate candidates for a work object. For example, a sales lead (work object) has a geographic location attribute. The lead candidate object (territory) has also a geographic location attribute. These two attributes are mapped to each other.

Related Topics
• Lead Processing Activities: Explained

Configure Sales Lead Assignment Rules

Lead Assignment Rules: Explained

You can specify assignment rules and rule sets for assignment of resource candidate objects to the lead work object. This topic provides some examples of how assignment manager uses rules to evaluate and recommend candidate assignments for your specified lead work objects. It also outlines some basic questions to consider before creating rules.

Assignment rules are created using work objects, candidate objects, attributes, and conditions. You can use multiple types of assignment rules and rule sets for assignment of candidate objects, such as rank, qualification status, and resources, to the lead work object. For example, you can specify the assignment rule that assigns resources to sales leads by assigning individual sales resources that meet the rule criteria.
Assignment Rule Criteria

An assignment rule can have one or more assignment criteria. For example, all leads, lower than a certain deal size and for a specific product, are assigned to a specific Partner resource. Other example might include assigning only those leads generated from a specific sales campaign, such as a CEO round table discussion event, to a specific salesperson.

Assignment Rule Considerations

When designing rules, carefully consider how you want to match the lead candidates to the lead work objects. For example, would you want resources assigned based on their geographic location, or their product knowledge, or their skill level, or a combination of any of these attributes? Do you want to match candidates only, or would you like to match them and score them? In a multiple candidate scenario, do you want to assign all matching candidates or only those who achieve higher than a specific score?

Related Topics

- Using Territory-Based Assignment with Rule-Based Filtering: Example
- Creating Assignment Rules: Examples
- What’s the difference between rule-based and territory-based assignment?

Setting Up Score and Rank for Leads: Explained

Sales representatives need to score and rank leads so that the lead score determines the rank assigned to the lead. The sales administrator can set up ranking rules based on the score.

Defining the Scoring and Ranking Rules

You can define the scoring and ranking rules that you want sales representatives to use in the lead management application. For example, you want to define the score ranges and corresponding rank and color values as shown in the following table:

<table>
<thead>
<tr>
<th>Score</th>
<th>Rank Name</th>
<th>Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-30</td>
<td>Cold</td>
<td>Blue</td>
</tr>
<tr>
<td>31-60</td>
<td>Warm</td>
<td>Yellow</td>
</tr>
<tr>
<td>61-100</td>
<td>Hot</td>
<td>Red</td>
</tr>
</tbody>
</table>

This example shows that when the sales representative enters a score value of 50 when creating or editing a lead, the rank will automatically be populated with the value of Warm, and the corresponding yellow color is displayed in the UI. The same color for the score is used when the lead is viewed in a list.

Setting Up the Scoring and Ranking Rules

The following table lists the default values for score and rank that is provided for you.

<table>
<thead>
<tr>
<th>Minimum Score</th>
<th>Maximum Score</th>
<th>Rank Name</th>
<th>Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>30</td>
<td>Cold</td>
<td>Green</td>
</tr>
</tbody>
</table>
The minimum score and maximum score are text fields that require numeric values. The rank name is determined from the list of values that can be modified from the Rank lookup type MKL_LEAD_RANK_SETID. You can choose a color from your standard UI color widget.

**Related Topics**

- Creating Assessment Templates: Procedure

## Configure Assessment Reference Data for Sales Leads

### Setting Up Assessment Templates: Points to Consider

You can implement assessment templates to let salespeople analyze the health of a business object, such as a lead or an opportunity, and suggest appropriate next steps based on its diagnosis. To best plan and create assessment templates, you should consider the following points:

- Ratings
- Questions, question groups, and question weights
- Responses and scores
- Associated task templates

### Ratings

A rating is a textual qualification, such as Excellent. There are three delivered ratings in the assessment template: Excellent, Average, and Poor. Ratings provide a metric other than a numeric score to qualify the outcome of an assessment. Ratings are created at the beginning of the assessment template creation process. They are later applied to possible responses to questions in the template, which associates each rating with a score. Ratings display an appropriate feedback based on the completed assessment score once you submit an assessment. When setting up ratings and applying them to possible responses, remember that ratings and their associated feedback text will eventually display as part of the overall assessed health of a business object.

### Questions, Question Groups, and Question Weights

Questions are the main components of an assessment template. They are written to help in systematically determining the health of a business object, and they are grouped into logical collections called Question Groups. Each question in the template is assigned a question weight. Question weight is expressed as a percentage, which is the relative importance of the question within the template. When you use an assessment template to perform an assessment, a question’s weight is multiplied by the normalized response score given for the question to produce a weighted score for that question.

When setting up questions, question groups, and question weights, you must carefully analyze which factors determine the health of a particular business object (like a lead or an opportunity) in your organization. Use those factors to create your
question groups; and then write three to five questions per group that are weighted according to your analysis. There is no limit to the number of questions that can be in a question group, but each question group must have at least one question.

**Responses and Scores**

Responses are attached to questions in the template. Each question should have at least two responses, unless it's a free-form only question. More than one response can be tied to the same rating. However, between all of its responses, each question should accommodate at least two ratings, unless it's a free-form only question. For example, if your ratings are Excellent, Average, or Poor, for each question you can include two responses that correspond to at least one of those ratings, such as average. There must be enough responses to cover at least two of the ratings, such as Excellent and Average. You assign a score to each response for a question, and the application normalizes the score based on a standard scoring scale.

When an assessment template is used to perform an assessment, a question's weight is multiplied by the normalized score of the response given for the question to produce a weighted score for that response. When adding responses to questions, ensure that the scores and ratings you assign to each response correlate. In other words, the higher the score you assign to the response, the higher the rating should be so that you have a strong quantitative relationship between the two. Also note that you can allow free-form responses for one or more questions in the template, but free-form responses are never scored.

**Associated Task Templates**

A task template is an instruction to generate a group of related activities. You can associate task templates with an assessment template to recommend tasks that should be performed after an assessment has been done for a business object. When you associate task templates with an assessment template, you can indicate a score range for each task template. Based on the total score of any assessment that uses your template, one or more task templates will be recommended as follow-up activities. For a task template to be available to associate with an assessment template, it must be assigned to the same business object type as that assigned to the assessment template, and it must have a subtype of Assessment. Ensure that you have set up task templates correctly before associating them to assessment templates.

**Related Topics**

- Creating Assessment Templates: Procedure

**Assessment Template Status Codes: Explained**

This topic explains the status codes for an assessment template. Throughout the life of an assessment template, you can assign different status codes.

These status codes control the actions you are allowed to make against an assessment template.

- In Progress
- Active
- Retired

**In Progress**

This is the initial status of an assessment template. In this status, you can edit any part of the template. This is the only status in which you can delete a template. If the template is not deleted, it moves to the Active status.

**Active**

This is the status assigned when the assessment template has been deployed for general usage. In this status, you can make only minor textual edits to it, including, but not limited to, template description, question text correction, question sequencing
change, response description, and score range feedback. From this status, you can move the template to Retired, but you cannot delete it.

**Retired**

When an assessment template is in this status, it is no longer available for general usage. You cannot edit any part of it, and you cannot move it to any other status. However, it can still be copied. Active templates that are deleted revert to this status.

**Assessment Template Score Range: How It's Calculated**

The application calculates the score range for an assessment template using the question weights and the ratings and scores assigned to the possible responses for all the questions in the template. This topic explains when the score range is calculated and the components that are used in the calculation, so that you can make the best decision regarding the feedback text to apply to each score range. In addition to the automatic score range calculation, you can manually adjust the score range by using the administration functionality.

**Settings That Affect Score Range**

In order for the application to calculate the assessment template score range, you must:

- Apply weights to all template questions.
- Configure ratings and apply them to possible responses for all template questions.
- Apply a score to each of the possible responses for all template questions.

**How Score Range Is Calculated**

The score ranges for each rating in an assessment template are determined using the lowest and the highest weighted response scores for each question. So for each rating score range, the lower end of the range starts where the previous rating range ended, and the higher end of the range is the sum of the highest weighted scores that can be attained for that rating.

This table displays a simple example of the components used in the score range calculation.

<table>
<thead>
<tr>
<th>Question (Weight)</th>
<th>Response (Normalized Score)</th>
<th>Weighted Score</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>What is the customer win? (20%)</td>
<td>Lower Operating Cost (100)</td>
<td>20</td>
<td>Excellent</td>
</tr>
<tr>
<td></td>
<td>Higher Revenues (80)</td>
<td>16</td>
<td>Average</td>
</tr>
<tr>
<td></td>
<td>Other (53)</td>
<td>11</td>
<td>Average</td>
</tr>
<tr>
<td></td>
<td>Don’t Know (27)</td>
<td>5</td>
<td>Poor</td>
</tr>
<tr>
<td>What is our win? (80%)</td>
<td>Reference (60)</td>
<td>48</td>
<td>Average</td>
</tr>
<tr>
<td></td>
<td>Resale (50)</td>
<td>40</td>
<td>Poor</td>
</tr>
<tr>
<td></td>
<td>Partnership (100)</td>
<td>80</td>
<td>Excellent</td>
</tr>
</tbody>
</table>
This table displays the score range calculation based on the components from the first table.

<table>
<thead>
<tr>
<th>Rating</th>
<th>Score Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>65 - 100</td>
</tr>
<tr>
<td>Average</td>
<td>46 - 64</td>
</tr>
<tr>
<td>Poor</td>
<td>0 - 45</td>
</tr>
</tbody>
</table>

**Note:** If a template administrator does not use a particular rating while assigning ratings to possible responses, this could result in improper score range calculations. To counteract this problem, the score range calculation uses a built-in correction algorithm to ensure proper score ranges. The correction algorithm works like this: For a question where a particular rating is skipped, the low score for the skipped rating is calculated to be equal to the high score of the next lower ranked rating. The high score for the skipped rating is calculated to be equal to the low score of the next higher ranked rating. Using the ratings displayed in the tables above, if the rating Average is not used for a question’s possible responses, the score range calculation assigns a low score to Average for that question that is equal to the high score of Poor for that question. It also assigns a high score to Average for that question that is equal to the low score of Excellent for that question. This ensures that the overall template score range for Average is calculated to fall between the score ranges for Poor and Excellent.

**Assessment Template Components: How They Fit Together**

The question weight, response score, and response rating are the assessment template components. They fit together to calculate and display the overall assessment score, rating, and feedback text.

The assessment multiplies a question weight by a response score to achieve a weighted score for an assessment template response. It adds the weighted scores for all responses together to determine the total assessment score. This score falls within a score range calculated in advance, that is associated with a response rating and feedback text. Therefore, the
score range within which the total assessment score falls determines the rating and feedback text to display for a completed assessment.

**Question Weight**

The question weight is the relative importance of a question within an assessment template. The template expresses it as a percentage. All of the question weights within a template must total to exactly 100. When you use an assessment template, the template multiplies a question's weight by the score of the question response to produce a weighted score for that response.

**Response Score**

A response score is the score that the template administrator assigns to a possible question response in the template. The template administrator sets response scores with no upper or lower bounds. The template normalizes each score to accurately score an assessment that uses the template. The template normalizes the response scores by assigning a score of...
100 to the highest response score. The template then assigns all other responses a normalized score relative to that highest score.

When you use an assessment template, the template multiplies the normalized score of the question response by the question’s weight to produce a weighted score for that response.

**Response Rating**

A response rating is:

- The rating assigned to a possible response to a question in the template.
- A textual qualification, such as Excellent or Poor that provides a metric other than a numeric score for qualifying the outcome of an assessment.

A response rating relates directly to a response score, and this relationship should ensure that a higher score translates to a higher rating.

Early in the template creation process, the administrator configures ratings to assign to responses. The administrator then assigns scores and ratings to responses, and the application calculates score ranges based on those entries. The application assigns each rating to a score range, and gives the administrator the opportunity to apply feedback text to the rating-score range combination.

When you use an assessment template, the template adds the weighted scores from all responses to determine the total assessment score. That score falls somewhere within the calculated score ranges. These ranges then determine which rating the template assigns to the assessment and what feedback text to display. The maximum total assessment score is 100.

**Assessment Templates and Task Templates: How They Fit Together**

One of the steps for creating an assessment template is associating task templates. You would take this step if you want to recommend sets of tasks to be done after an assessment is performed using your template. You associate task templates to
ranges of scores in the assessment template, and where the overall assessment score falls within those ranges determines the tasks that are suggested to be performed after the assessment.

**Assessment Template**

An assessment template is a set of weighted questions and possible responses used to evaluate the health of a business object such as an opportunity or a lead. An assessment template can be associated with one or more task templates that are recommended based on the outcome of an assessment.

**Task Template**

A task template is an instruction to generate a group of related activities. By marking a task template with a subtype of Assessment, you make that task template available for association with assessment templates. The task template's business object type should be the same as that assigned to the assessment template. When an assessment is performed using an assessment template that has associated task templates, one or more task templates are recommended based on the total score of that assessment and can be used to generate a list of activities to perform.

For example, you can associate a task template called Engage Business Development Manager with your assessment template called Potential for Win-Win. Associate the task template with the score range of 86 to 100, so if an assessment using the assessment template Potential for Win-Win scores within that range, the application recommends the Engage Business Development Manager task template and a list of follow-up activities based on that template can be generated.
Associating Task Templates with Assessment Templates: Procedure

Associate task templates with assessment templates to recommend tasks to salespersons based on the assessment outcome. When a task template is associated with an assessment template, a set of related tasks appears as follow-up activities after a salesperson completes the assessment for an object.

Task templates are preconfigured, individual tasks that you can group together and associate with an object. Template tasks are a set or group of individual tasks from the task template. An administrator can only create a task template for the following objects:

- Opportunity
- Lead
- Campaign
- Customer

**Note:** To be available for selection, the task template must have a subtype of Assessment and belong to the same object as the assessment template. For example, when creating an assessment for an opportunity, you must select an opportunity task template.

While task templates can be associated with assessments performed in the desktop UI, in the simplified UI, they will not display to end users.

To associate task templates:

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the assessment template setup task for the applicable business object. For example, search for the Manage Opportunity Assessment Templates task.
   The Manage Assessment Templates page appears.
3. Click *Create*.
4. Navigate to the Associate Task Templates page.
5. Click the *Create* icon.
6. Select the task template that you want to associate with the assessment template.
7. Click *OK*.
   The selected task template appears in the Associate Task Templates page.

**Note:** If you enter a score range, you can view the task template only when the assessment is within that score range.

8. Click *Save*.
   The task template is associated with the assessment template.

Related Topics

- Creating Assessment Templates: Procedure
FAQs for Configure Assessment Reference Data for Sales Leads

What happens if I include a free-form response for a question?

A score of 0 is assigned for free-form responses.

A free-form response option will have no effect on the overall assessment score. The free-form response offers the opportunity to enter a textual response to a question that does not conform to any of the prepopulated responses provided by the assessment template.

What's a question group?

A question group is a logical grouping of questions within an assessment template, and is strictly used as a category header for those questions. By naming the question group carefully, you can provide the template user an idea of the type of questions to expect in each group.

Why am I being asked to enter question weights again?

This step lists all of the assessment template questions in one place, and provides you with the opportunity to edit weights as necessary to ensure that the sum of all weights totals 100.

Multiple Business Units

Business Units: Overview

As part of your enterprise structure in the applications, the business unit (BU) primarily serves as a container or construct that can be used to separate or share setup and reference data. A business unit typically performs one or many business functions and has a specific place in the organization hierarchy. Usually, each business unit has a manager, strategic objectives, a level of autonomy, and responsibility for its profit and loss.

A business unit can:

- Process transactions on behalf of many legal entities and post transactions to its own primary ledger.
- Segment transactional data from other business units. For example, if you run your Sales business separately from your Marketing business, you segment the Sales business data to prevent access by the Marketing employees.
- Report on transactions.
• Share sets of reference data across applications. Business units process transactions using reference data sets that reflect your business rules and policies across the company. You can share reference data, such as payment terms and transaction types, across business units, or you can choose to have each business unit manage its own set, depending on the level at which you wish to enforce common policies.

**Business Unit Terminology**

Be aware of the following terminology as you implement and work with multiple business units:

- **Master data**: Data that is managed globally and is not specific to any BU. Examples include:
  - Accounts: Customer accounts cannot be segmented by BU.
  - Users: Users can be associated to BUs through their resource organization membership, but in general are managed globally.
  - Products: While different BUs might sell different products, the definition of a product is global.

- **Reference data**: Data that is used by transactional objects like leads and opportunities. Reference data can be different across BUs or common across BUs. Reference data is organized into reference data sets, also called sets, each with a unique Set ID. Examples include:
  - Lookup types, such as those that provide lists of values for several fields in opportunities and leads
  - Opportunity sales methods, available for customization in the sales methods setup pages

- **Transactional data**: Refers to leads, opportunities, and contracts that are created during a typical sales process.

**Multiple Business Units in Leads: Overview**

Using multiple business units (BUs) in leads lets you offer different versions of the Leads UI according to the BU of the user. Since users in one BU cannot view leads from a BU that they don’t have access to, you can present, for example, different drop-down lists for leads in different BUs.

**Multiple Business Units in Leads Use Case**

Your company has two divisions, each with three BUs for the geographical areas where they do business: North America, Europe, and Asia. The sales processes between the three business units is different. You can tailor the Leads pages based on the different business units.

For example, when a lead is created in the North America BU, salespeople have a finite set of values to select from in the Lead Reject Reason drop-down list. In contrast, salespeople who work in the Europe BU have different reasons for rejecting a lead and need to use values that are specific to their business unit.

**Set ID Lookup Types**

To enable different values in a drop-down list for a specific BU, you use the supplied set-ID enabled lookup types for leads.

The following table shows the leads set-ID lookup types, the values, and the descriptions. Use the Manage Set Enabled Lookups task from the Setup and Maintenance work area to access the lookup types related to leads.

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Lookup Values</th>
<th>Description</th>
</tr>
</thead>
</table>
| Lead Qualification Budget Status | • Approved  
• Pending  
• Unknown | The approval status of a customer budget. The data is used to assess the lead qualification status. |
### Lookup Type

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Lookup Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Rank</td>
<td>• Cold</td>
<td>Lead rank values used as a measure of lead quality and prioritization.</td>
</tr>
<tr>
<td></td>
<td>• Hot</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Warm</td>
<td></td>
</tr>
<tr>
<td>Lead Reassignment Reason</td>
<td>• No activity</td>
<td>Possible reasons specified for reassigning leads.</td>
</tr>
<tr>
<td></td>
<td>• Other</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Workload</td>
<td></td>
</tr>
<tr>
<td>Lead Reject Reason</td>
<td>• Duplicate lead</td>
<td>Possible reasons specified for rejecting leads.</td>
</tr>
<tr>
<td></td>
<td>• Failed to reach contact</td>
<td>Rejected leads can be reassigned or retired.</td>
</tr>
<tr>
<td></td>
<td>• Incorrect data</td>
<td></td>
</tr>
<tr>
<td>Lead Retire Reason</td>
<td>• Duplicate lead</td>
<td>Possible reasons for retiring leads. Retired leads are considered closed leads.</td>
</tr>
<tr>
<td></td>
<td>• No purchase interest</td>
<td></td>
</tr>
<tr>
<td>Lead Registration Type</td>
<td>• Co-sell</td>
<td>Types of leads available for partners.</td>
</tr>
<tr>
<td></td>
<td>• Referral</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Resale</td>
<td></td>
</tr>
<tr>
<td>Lead Source Channel</td>
<td>• Direct mail</td>
<td>Source channel responsible for lead generation.</td>
</tr>
<tr>
<td></td>
<td>• E-Mail</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Fax</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Marketing Cloud</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Phone</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Sales campaign</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Sales visit</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Social</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Company web site</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Wireless message</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Model-based prediction</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Rules-based prediction</td>
<td></td>
</tr>
<tr>
<td>Lead Time Frame</td>
<td>• 3 months</td>
<td>Lead cycle duration that usually coincides with a typical sales cycle duration for products and services offered.</td>
</tr>
<tr>
<td></td>
<td>• 6 months</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 9 months</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 12 months</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 15 months</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• 18 months</td>
<td></td>
</tr>
</tbody>
</table>

### Selecting BUs in the Leads UI

Some users can transact in multiple BUs, for example, salespeople who are members of different sales teams. These users can select the BU they want when the lead is being created. Based on their selection, the set ID-enabled lookup types display based on the BU of their choice.

### Additional Leads Customization by Business Units

You can customize BUs to meet your specific leads requirements. For example, you can:

- Select which assignment rules to use for your leads, which lead assessment templates to use, and so on.
- Set BU attributes to be visible in the **Add Fields** UI when performing a search for leads.
• Hide BU attributes for single BU deployments in all transaction and search UIs.
• Hide BU attributes for multiple BU deployments for users who transact in one BU only.

Related Topics
• Multiple Business Units High-Level Setup Steps
• Managing Set-Enabled Lookups: Examples

Specifying Leads Business Unit Properties: Procedure
You can set several lead settings at the business unit (BU) level. When you set an option such as a rule or template at the BU level, the option setting is effective for only the BU that you indicate. You set lead BU-level options in the Specify Sales Business Function Properties page, under the Lead Settings section. The Specify Sales Business Function Properties page is accessible using the Setup and Maintenance Define Business Units for Sales task list. Within that task list, you access the Specify Sales Business Function Properties task.
Use the following procedure.

1. Sign in as a setup user or the sales administrator and navigate to the Setup and Maintenance work area.
2. Search for and select the Define Business Units for Sales task list.
3. Within the Define Business Units for Sales task list, find the Specify Sales Business Function Properties task.
4. The Select Scope dialog box appears. In this dialog box:
   a. Select the Specify Sales Business Function Properties radio button.
   b. In the Business Unit list of values, click Select and Add.
   c. Click Apply and Go to Task.
5. Search for and select the applicable business unit.
6. Click Save and Close.
7. As needed, in the Specify Sales Business Function Properties page, under the Lead Settings section, set the options for the following:
   o Lead Search
   o Lead Assignment
   o Lead Template
   o Partner Lead Registration
   o Object Mapping
8. Save your changes.

Lead Search
The following table describes the lead BU-enabled settings for lead searches:

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Search Range in Days</td>
<td>Specify the default number of days used to derive the creation date range for searching leads. The search criteria is derived by using the current date for the creation end date value and the profile option to derive the creation start date value.</td>
<td>30</td>
</tr>
</tbody>
</table>
Profile Option | Description | Default Value
---|---|---
Profile Option | Description | Default Value
For example, if you want leads for the last 15 days to be the default query action, then set the profile value to 15. The default creation date search criteria will have an end date for the current date and the start date will be 15 days prior to the current date. The values can be overridden in the search criteria.

The value for the default number of days must be a positive number. If the value is not a positive number or left blank, the value of 30 days is used.

This profile option can be defined at both the site and user levels.

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Threshold Warning in Days</td>
<td>Specify the number of days for the lead creation date search criteria before issuing an alert to the user.</td>
<td>None</td>
</tr>
<tr>
<td>Maximum Search Range in Days</td>
<td>Specify the maximum number of days allowed when searching leads based on the creation date range.</td>
<td>360</td>
</tr>
</tbody>
</table>

**Lead Assignment**

The following table describes the lead BU-enabled settings for lead assignment:

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualification Rule</td>
<td>Specify the rule to evaluate the lead and assign the lead status per rule conditions.</td>
<td>None</td>
</tr>
<tr>
<td>Ranking Rule</td>
<td>Specify the rule to evaluate the lead and assign the lead rank per rule conditions.</td>
<td>None</td>
</tr>
<tr>
<td>Scoring Rule</td>
<td>Specify the rule to evaluate the lead and assign the lead score per rule conditions.</td>
<td>None</td>
</tr>
</tbody>
</table>

**Lead Templates**

The following table describes the lead BU-enabled settings for lead templates:

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assessment Template</td>
<td>Specify the assessment template questionnaire to use when creating a lead assessment.</td>
<td>None</td>
</tr>
</tbody>
</table>
Profile Option | Description | Default Value
--- | --- | ---
Qualification Assessment Template | Specify the assessment template to use for evaluating and qualifying leads. | None

Partner Lead Registration
The following table describes the lead BU-enabled settings for partner lead registration:

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Days Before Expiration</td>
<td>Specify the number of days prior to expiration that deal registrations must be included in the predefined saved search.</td>
<td>30</td>
</tr>
<tr>
<td>Approval Administrator</td>
<td>Select the recipient of notifications when an approver cannot be determined, who is qualified to respond to the notification, and can modify approval configurations.</td>
<td>None</td>
</tr>
</tbody>
</table>

Object Mapping
The following table describes the lead BU-enabled settings for partner object mapping:

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead to Opportunity</td>
<td>Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes when a direct lead is converted to an opportunity.</td>
<td>None</td>
</tr>
<tr>
<td>Partner Lead to Opportunity</td>
<td>Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes when a partner lead is converted to an opportunity.</td>
<td>None</td>
</tr>
</tbody>
</table>

Related Topics
- Specifying Opportunity Business Unit Properties: Procedure

Adding the Business Unit Field in Leads: Procedure
Sales users can associate a business unit with a lead, if you have enabled the functionality. Use Oracle Application Composer to add the Business Unit field to the leads UI. This enables a finite list of values to be displayed in the drop-down list of the Business Unit field.
Adding the Business Unit Field

Use the following procedure to add the Business Unit field to the Edit Lead page:

- **Note:** When modifying the UI, you must make your changes in a sandbox. See the Oracle Sales Cloud Customizing Sales guide for more information about using sandboxes.

1. Sign in to the application as the sales administrator or a setup user, such as application implementation consultant.
2. Create and activate a sandbox to work in.
3. Navigate to Application Composer.
4. In the Application Composer page, in the Application list of values, select Sales as the application.
5. Under Standard Objects, navigate to Sales Lead, then Pages. The Sales Leads: Pages page appears.
6. In the Sales Leads: Pages page, ensure that the Simplified Pages tab is active.
7. In the Details Page Layouts region, click the duplicate layout icon to duplicate and edit an existing layout.
   - The Duplicate Layout dialog window appears. Note that you may be using a different layout than the default one. If this is the case, then select the appropriate layout.
8. In the Duplicate Layout dialog window, enter the new layout name and select the existing page layout to duplicate.
9. Click Save and Edit.
   - The Details Layout: Default custom layout page appears, with the name of the new layout in the page title.
10. In the Summary subtab region, click the edit icon.
    - The Details Layout: Default custom layout: Edit Summary page appears.
11. In the Details Layout: Default custom layout: Edit Summary page, find the Business Unit field in the Configure Detail Form list. Move the field from the Available Fields list to the Selected Fields list.
12. Click Save and Close.
13. Click Done in the Details Layout: Default custom layout page.
14. Validate the change by navigating to the edit lead page and ensuring that you can see the Business Unit field in the edit opportunity page.
   - Note that the user you sign in with to validate the change must belong to a sales resource organization. For example, you must sign in as a sales representative.
15. Publish the sandbox.
16. The Business Unit field is now available to sales users in the edit lead simplified pages.

Mass Update

Enabling Mass Update for Leads

In Oracle Sales Cloud, you can use the mass update feature to update fields on multiple records at once. Use Application Composer to enable the update action for leads on the Leads landing page. Optionally, you can set a profile option to control how many lead records to update at once.

Enabling the Update Action

Use the following procedure to add the Update action to the Leads landing page.

1. Sign in as the sales administrator or as a setup user.
2. Create and activate a sandbox. You manage sandboxes in the menu located under your user name in the UI. For more information on using sandboxes to make customization changes, see the Oracle Sales Cloud - Customizing Sales guide.

3. In the navigator menu, click Application Composer.

4. In the Application list of values, select Sales.

5. In the Objects navigation tree, expand Standard Objects, then expand the Sales Lead object.

6. Click the Pages node.

7. Ensure that the Simplified Pages tab is selected.

8. From the Landing Page Layouts section, click the duplicate layout icon to duplicate and edit an existing layout.

   The Duplicate Layout dialog window appears.

9. In the Duplicate Layout dialog window, enter the new layout name and select the existing page layout to duplicate.

10. Click Save and Edit.

    Landing Page Layout page appears, with the name of the new layout in the page title.

11. Click the pencil icon to edit the layout.

    The Landing Page Layout page displays the new layout name, along with different sections for the areas of the overview page (list or landing page) that you can customize.

12. In the Configure Detail Form: Buttons and Actions region, move the Update action from the Available Actions box to the Selected Actions box.

13. Click Save and Close.

14. Click Done.

15. Publish the sandbox you are working in.

Testing the Customization

After publishing the sandbox, the Update action should be available from the Leads landing page. Use the following procedure to test that your customization is working.

1. Sign in as a user who has access to leads, such as a sales representative, sales manager, or sales administrator.

2. Go to the Leads landing page and click the Actions menu to verify that the Update action is available.

Setting the Profile Option

The profile option Lead Mass Update Threshold Value (MKL_MASS_UPDATE_LEAD_THRESHOLD) controls how many lead records can be updated at once. Use the following procedure to modify the profile option setting.

> Note: By default, the profile option is set to 25 records. If null, then the application sets the number of records that can be mass updated to 10. The maximum number of records that can be mass updated is 500.

1. Sign in as the sales administrator and navigate to the Setup and Maintenance work area.

2. Search for and select the Manage Sales Lead Profile Options task.

   The Manage Sales Lead Profile Options page appears.

3. In the search region, enter the profile option name in the Profile Display Name field.

4. Click Search.

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

6. Set the profile option value as needed.

Related Topics

- Applying Mass Update to Leads
Can I perform a mass update for leads of different business units?

You can’t perform a mass update of modified values for leads that apply to different business units. A dialog box is displayed if the selected leads belong to different business units which do not share the same reference data sets. You must remove the set-enabled attribute for the offending leads and perform the mass update only for leads with business units containing the same reference data sets. For more information on reference data sets, see the topic Business Units and Reference Data Sets: How they Work Together. Also, consult the online help, using keywords “reference data”.

Configure Notes for Sales Leads

Defining Notes: Points to Consider

A note is a record attached to a business object. Notes capture nonstandard information received as you do business. When setting up notes for your application, you should consider the following points:

- Which new note types you want to add.
- How you want to map these new note types to business objects in your area.

Note Types

Note types are assigned to notes when they’re created, to categorize them for future reference. During setup you can add new note types, and use a process called note type mapping to restrict them by business object type. When deciding which new note types you want to add, keep in mind how you want your users to search for, filter, and report on these notes.

Note Type Mappings

If you add new note types, you must map them to the business objects you use in your product area. Here are some points to consider when mapping note types:

- When you select a business object other than Default Note Types, you only see the note types that apply to that object.
- If no other note types appear, then note type mapping doesn’t exist for that object and the default note types are used. Select Default Note Types to see which default note types exist in the application.
- If you modify a default note type, it affects all the business objects that don’t have a note type mapping.

Suppose you decide to add a new note type of Analysis for your product area of Sales-Opportunity Management. You use note type mapping to map Analysis to the Opportunity business object. Now, every time you create or edit a note for an opportunity, you see Analysis as an available note type option.

When deciding which note types to map to business objects, you should keep the same considerations in mind that you did when you decided which note types to include.

Related Topics

- Extending Oracle Sales Cloud: How It Works
Configure Tasks for Sales Leads

Defining Tasks: Points to Consider

A task is a unit of work to be completed by one or more people by a specific completion date. When using tasks in your application, you should consider the following points:

- **Tasks**
- **Task Templates**

**Tasks**

You define a task with a description, due date, and category. Each task has an owner, who oversees or is responsible for the task, and one or more assignees who perform the work.

The task can be related to a business object, such as an opportunity, a customer, or one or more external contacts. Tasks can also have notes for general information and attachments for tracking e-mail or project documents.

**Task Templates**

Often, a process includes a set of tasks that are performed repeatedly. To make this easier, administrators can define task templates, which represent a group of tasks. You can use a task template when working on a particular business object. You select the appropriate task template for your process and the application creates the tasks and associates them with the business object being worked on.

**Note:** Extensibility features are available on the Task object. For more information, see the Oracle Sales Cloud - Customizing Sales guide.

Turning a Business Process into a Task Template: Example

This example illustrates how to create a task template that represents a business process.

**Scenario**

A sales manager wants to create a task template for her department's client product demonstration process.

**Client Product Demonstration Activities**

The client product demonstration process occurs regularly. The sales manager does not want to manually create tasks for this process every time it occurs, so she decides to create a task template that includes the business process activities. Each time she repeats the business process, she can use the task template to automatically generate the appropriate tasks that need to be performed.

**Analysis**

The business process consists of the following activities:

- Book a conference room.
• Create an agenda.
• Confirm the date and time with the client.
• Make arrangements with presenters.
• Deliver product demonstration.
• Follow up with client.

**Resulting Task Template**

Based on the analysis of the business process, the following task template is created:

**Task Template Name: Client Product Demonstration**

<table>
<thead>
<tr>
<th>Task</th>
<th>Category</th>
<th>Lead Days</th>
<th>Duration Days</th>
</tr>
</thead>
<tbody>
<tr>
<td>Book conference room</td>
<td>Preparation</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Create agenda</td>
<td>Preparation</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Confirm date and time with client</td>
<td>Call</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>Schedule presenters</td>
<td>Preparation</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>Deliver demonstration</td>
<td>Demonstration</td>
<td>7</td>
<td>1</td>
</tr>
<tr>
<td>Follow up with client</td>
<td>Call</td>
<td>10</td>
<td>1</td>
</tr>
</tbody>
</table>

**How can I create a task template that is available to associate with assessment templates?**

Create the task template with a subtype of Assessment.

**What are the statuses a task can be in?**

Tasks can have the following statuses by default. You can change or delete these statuses, or add more to fit your needs.

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canceled</td>
<td>The task was canceled.</td>
</tr>
<tr>
<td>Complete</td>
<td>The task was completed. You can change this status to another one as needed.</td>
</tr>
<tr>
<td>In progress</td>
<td>The task is currently active and being worked on.</td>
</tr>
</tbody>
</table>
### Status and Meaning

<table>
<thead>
<tr>
<th>Status</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not started</td>
<td>The task has not yet been started.</td>
</tr>
<tr>
<td>On hold</td>
<td>The task is not actively being worked on, but has not yet been completed.</td>
</tr>
</tbody>
</table>

If a task is set to Complete, the Percentage Complete field for the task is set to 100% and the end date is set to the current date.

**Note:** If you change the status of a Complete task to something else, the Percentage Complete field value does not change automatically.
13 Setting Up Price Books

Price Books: Explained

Use price books to create product lists with prices that you can then use in other Oracle Sales Cloud applications, such as enterprise contracts, accounts, and opportunities.

The following are use cases for using price books in Oracle Sales Cloud:

- Set default list prices on contract sales agreements. See the topic, Creating a Sales Agreement Line: Explained, for more information.
- Associate price books with accounts and opportunities, using customization. For more information see the article, Enabling Price Books in Opportunities, available on My Oracle Support (support.oracle.com) as Doc ID 2000330.1.
- Associate price books in Oracle Sales Cloud Consumer Goods. For more information, see the topic, Associating Price Books in Oracle Sales Cloud for Consumer Goods.

Price Book Prerequisites

To use price books, your sales catalog must be set up with the products they use included in a product group. See the topics on sales products and sales catalogs for more information.

Price Book Statuses

Price books have statuses, such as Draft or Active. The status of a price book determines what actions you can take on it.

The following table shows price book statuses and additional information about the behavior of price books while in a specific status.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
<th>Additional Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>Indicates a price book that is not yet available for use.</td>
<td>• Only price books in Draft status can be deleted.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Can be moved to Active status.</td>
</tr>
<tr>
<td>Active</td>
<td>Indicates a price book that is available for use.</td>
<td>• Can be updated to Expired status.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note you cannot delete expired price books.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Cannot be updated to Draft status.</td>
</tr>
<tr>
<td>Expired</td>
<td>Indicates a price book that is no longer available for use.</td>
<td>• Cannot be moved to Draft status; therefore, can never be deleted.</td>
</tr>
</tbody>
</table>
The following image shows the transitions allowed for the statuses.

![Price Book Status Transitions]

The default status for a new price book is Draft.

Working with Price Books: Procedures

You use price books to create product lists with prices that you can then use in other Oracle Sales Cloud applications, such as enterprise contracts, accounts, and opportunities.

Creating a Price Book

Use the following procedure to create a price book.

1. Sign in as the sales administrator.
2. Navigate to **Sales - Price Books**.
   - The Price Books landing page appears.
3. Click **Create Price Book**.
   - The Create Price Book page appears.
4. Enter the details of the price book.
   - **Name**: Enter a unique name for the price book.
   - **Currency**: Select a currency from the list of implemented currencies. Note that the currency set in your user preferences is initially used as the default currency.
   - **Description**: Optionally, enter a description for the price book.
5. Click **Save and Continue**. Or, click **Save** to save the price book so you can edit it later.
6. In the Edit Price Book page, add products. Click **Add** to add a single product line. Click **Add Many** to add several product lines.
7. Search for and select the product or products. Click **OK** in the search page to return to the edit page.
8. For each product line, fill in the following fields:
   - **UOM**: Select the unit of measure.
List Price: Enter a price.

9. Save your changes by clicking Save or Save and Close.
10. When you’re ready for your price book to become active and ready for use, change the Status to Active. After you save a price book in Active status, the name cannot be updated.

Editing a Price Book

Price books can be edited, but not all of the fields are editable when they are Active. See the Price Book Statuses section in this topic for more details on which fields are editable in the various statuses.

Use the following procedure to edit a price book.

1. Sign in as the sales administrator.
   The Price Books landing page appears.
3. Click the name of a price book.
   The Edit Price Book page appears.
4. Edit the price book as needed.

Copying a Price Book

You may want to copy a price book to save the time needed to create a new one. You can copy price books while they are in any status.

Use the following procedure to copy a price book.

1. Sign in as the sales administrator.
   The Price Books landing page appears.
3. Click the name of a price book.
   The Edit Price Book page appears.
4. From the Actions menu, select Copy Price Book.
5. In the dialog box, enter a new, unique name for the price book and click Save and Continue.
   The Edit Price Book page appears.
6. Edit the price book as needed.

Deleting a Price Book

Deleted price books are removed from the list of price books and are not available in consuming applications. Only price books in Draft status can be deleted.

Use the following procedure to delete a price book.

1. Sign in as the sales administrator.
3. Click the name of a price book.
   The Edit Price Book page appears.
4. From the **Actions** menu, select **Delete Price Book**.

**Related Topics**

- Managing Price Books and Taxation in Oracle Sales Cloud for Consumer Goods
14 Setting Up Promotions

Sales Promotions: Overview

In Oracle Sales Cloud, you can use a set of simplified pages to create and manage promotions that offer discounts based on specified conditions. After they're created, promotions can be used in other applications that want to leverage promotions in their pages.

⚠️ **Note:** No implementation tasks are required to set up promotions in Sales Cloud. However, to leverage promotions, you must customize the consuming applications using Oracle customization tools.

Promotions Tasks

As the sales administrator, you can perform the following tasks with sales promotions:

- Create promotions
- View and edit promotion details and attributes
- View a list of promotions
- Search for promotions
- Copy promotions
- Import promotions and create and update promotions using Oracle file-based import

Working with Sales Promotions: Procedures

Use the procedures in this topic as you create and maintain Oracle Sales Cloud promotions.

This topic covers the following tasks:

- Viewing a list of sales promotions: This task includes searching and filtering.
- Creating promotions: This task includes entering promotions basic information.
- Editing promotions: This task includes modifying the details of promotions.
- Copying promotions: This task includes copying a promotion so that you can repurpose it.
- Deleting promotions.

⚠️ **Note:** No implementation tasks are required to set up promotions in Sales Cloud. However, to leverage promotions, you must customize the consuming applications using Oracle customization tools.

Viewing a List of Promotions

To view a list of promotions, sign in as the sales administrator and navigate to **Sales - Promotions**.

In the list or summary page, you can:

- Search for promotions using the **Find** text box. For more information, see the topics on using search.
Filter the view between All Promotions, Active Promotions, and Inactive Promotions.

Creating and Editing Promotions
Creating promotions includes entering basic information, such as name and status, and saving the promotion for the first time. In edit mode you enter more details, such as the type of discount and the discount value.

Use the following procedure to create and edit a new sales promotion.

1. Sign in as the sales administrator and navigate to Sales - Promotions.
   The list of promotions appears.
2. Click the Create Promotion button.
   The Create Promotion page appears.
3. In the Name field, enter a unique name.
4. Optionally, enter a description for the promotion.
5. Optionally, select effective start and end dates.
6. Click Save and Continue to save the promotion and begin entering additional details.
   The page refreshes and becomes the Edit Promotion page.

   Note: At this point you can copy the promotion or delete it.

7. In the Status field, select the status of the promotion. Inactive promotions are not available in consuming applications.
8. In the Type field, select the adjustment type. The type can be either:
   - Fixed amount: Select Line Discount Amount.
   - Percentage: Select Line Discount Percent.
9. In the Apply To field, select whether the discount should apply to:
   - List Price: List price is the advertised, published or sticker price on a product being marketed to a business or consumer buyer.
   - Net Price: Net price is the actual price paid once any discounts are taken off the list price.
10. In the Value field, enter an amount. The amount is either the percentage of the discount or a fixed amount, depending on which type of adjustment you selected in the Type field.

Copying Promotions
To repurpose existing promotions, you can copy them any time after saving them.

Use the following procedure to copy a sales promotion.

1. Sign in as the sales administrator and navigate to Sales - Promotions.
   The list of promotions appears.
2. Select the name of a promotion in the list.
   The Edit Promotion page appears.
3. From the Actions menu, select Copy Promotion.
   The Copy Promotion dialog window appears.
4. In the Name field, enter a new, unique name for the promotion.
5. Click the Save and Continue button.

The Edit Promotion page appears, where you can edit the details of the promotion. See the Creating and Editing Promotion section in this topic for more information.

Deleting Promotions
To delete a promotion:

1. Sign in as the sales administrator and navigate to Sales - Promotions.
   The list of promotions appears.
2. Select the name of a promotion in the list.
   The Edit Promotion page appears.
3. From the Actions menu, select Delete Promotion.
4. Click Yes in the warning message window.

Marketing Promotions and Coupons: Explained
Promotion names and associated coupon codes provide tracking for offers extended to customers. This topic includes the following:

- Promotions, Coupons, and Marketing Treatments
- Promotions and Mini Campaigns
- Promotions, Coupons, and Source Codes
- Promotions, Coupons, and Marketing Responses

Promotions, Coupons, and Marketing Treatments
You can add promotion names and selective coupon codes to a treatment, where you design the promotional message and coupon content. You allocate the treatment to specific customer segments or lists of contacts when designing your multistage campaign. You can design one treatment per promotion, per coupon, or combinations of promotions and coupons. You can also assign promotions and coupons to more than one treatment.

Promotions and Mini Campaigns
You can add promotion names to your mini campaign, where you design the promotional message and coupon content to be delivered to the customer segments and lists of contacts selected for the campaign. You can design one mini campaign per promotion or multiple promotions; all coupons for the selected promotion are automatically included. You can also design many mini campaigns using the same promotion.

Promotions, Coupons, and Source Codes
A marketing source code is a unique identifier that represents a campaign or marketing activity and is used to track marketing effectiveness. While a source code does not represent individual promotions or coupons, it does represent the campaign stage instance, audience segment or list, and treatment combination of a multistage campaign, and the instance, campaign content, and audience segment or list combination of a mini campaign.
To view a listing of source codes and associated campaign components, navigate to the Review Marketing Source Codes task in Setup and Maintenance. Note that a source code can be listed more than once in this page to support querying on the related promotions and coupons.

Promotions, Coupons, and Marketing Responses

You can provide a source code when creating, editing, or importing a marketing response. A response generated as a result of an e-mail campaign URL that’s trackable or an e-mail bounce, inherits the source code derived from the originating e-mail marketing campaign.

By providing a source code on the marketing response, associated promotions and coupons are also added as informative information on the response. You can search responses by promotion name and coupon code.

Related Topics

- Marketing Source Codes: Explained
- Treatments: Explained
Chapter 15  
Setting Up Common Marketing

Manage Marketing Standard URLs

How Standard URLs and Marketing Content Fit Together

When creating marketing content, you can insert various types of URLs. Standard URLs are one type that you predefine and that can be used across many campaigns. Additional URLs are common response forms predefined by Oracle and ad hoc URLs that can be defined while creating content, if a predefined URL does not already exist. An Ad Hoc URL is not reusable.

Standard URLs

Navigate to the Manage Standard URLs task in the Functional Setup Manager application to define Standard URLs that can be easily selected when creating marketing content.

Enable tracking if you want to track e-mail recipient clicks. If enabled, every time a contact clicks a link in a campaign e-mail, the click is recorded as a response, together with details pertaining to the URL.

Managing URL Categories

The Marketing URL Category lookup provides the choices for Standard URL categories. Your application administrator can add categories by navigating to the Manage Marketing Standard Lookups task in the Functional Setup Manager application.

Marketing Content

To include a predefined standard URL in your marketing content, select the Element toolbar button and then select Standard URL. This feature is available for content created or edited in Treatments, Treatment Templates, Mini Campaigns, and Sales Campaigns.

Importing Marketing Standard URLs: Explained

You can create or update marketing standard URLs by navigating to Setup and Maintenance and selecting the Manage Marketing Standard URLs task or by importing data through interface tables. To import marketing standard URLs, you use the tool of your preference to load the data then use scheduled processes to import the data. Having a good understanding of the application object, interface table, and destination table will help you prepare your import data.

Consider the following when importing marketing standard URLs:

- Import interface table, destination table, and application object
- Scheduled processes

Import Interface Table, Destination Table, and Application Object

Importing marketing standard URLs involves one interface table and one destination table.

For information about available import attributes, see the Understanding File-Based Data Import and Export guide available on the Oracle Sales Cloud Help Center (https://docs.oracle.com/cloud/latest/salescs_gs/docs.htm). In the File Based Data
Imports chapter, see the topic for your import object of interest, which includes links to reference files for target import objects.

The following table lists the interface table, destination table, and resulting application object:

<table>
<thead>
<tr>
<th>Interface Tables</th>
<th>Destination Tables</th>
<th>Application Object</th>
</tr>
</thead>
<tbody>
<tr>
<td>MKT_IMP_URLS</td>
<td>MKT_TM_URLS</td>
<td>Marketing Standard URLs</td>
</tr>
</tbody>
</table>

To obtain the unique IDs of existing application data, use the Define Data Export Setup and Maintenance task list.

Scheduled Processes

Navigate to Scheduled Processes to schedule the import of data from the interface tables to the destination tables.

The following table displays the process you can schedule to import marketing standard URLs:

<table>
<thead>
<tr>
<th>Process Name</th>
<th>Process Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BulkURLsJob</td>
<td>Import Marketing Standard URLs</td>
</tr>
</tbody>
</table>

Review Diagnostics for Marketing

Marketing Source Codes: Explained

A marketing source code is a unique identifier that represents a campaign or marketing activity and is used to track marketing effectiveness.

Source Codes

Marketing source codes are automatically generated for every campaign and marketing activity. In a multistage campaign, you can override the generated source code value with your own value at the campaign level and for stages of type Event.

To view a listing of source codes and associated campaign components, navigate to the Review Marketing Source Codes task in Functional Setup Manager. Note that a source code can be listed more than once in this page to support querying on specific promotions and coupons. Consider the following scenario:

- Two segments are defined, Gold Customers and Silver Customers, representing the two highest levels of preferred customers.
- Two treatments are defined. One intended for Gold Customers that includes a promotion with two coupons. Another intended for Silver Customers that includes a promotion with one coupon.
- A campaign is created for the Summer product catalog. A stage is designed with a fixed date and does not repeat. Each segment is allocated to the corresponding treatment in the stage design.

The source codes for the stage are generated based on the combination of stage instance, audience, and treatment. Since the Gold Customer Product Promotion treatment has two coupons, the source code that represents the stage instance, audience, and treatment combination is listed twice.

The following table illustrates the source codes displayed in the Review Marketing Source Codes page for this scenario.
Using this same example, you can determine all campaign activities that include the Limited Time Discount by using **Query by Example** and entering the coupon name in the field provided above the **Coupon** column.

### Associating Source Codes to Responses and Leads

Source codes associated with responses and leads provide a reference to marketing campaign activities for tracking campaign effectiveness.

You can provide a source code when creating, editing, or importing a marketing response. A response generated as a result of an e-mail campaign trackable URL or an e-mail bounce inherits the source code derived from the originating e-mail marketing campaign.

A source code can be associated with leads when designing a lead generation stage in a multistage campaign, when manually creating or editing a lead, or when importing a lead. A lead created from a converted response will inherit the source code from the response.

### Define Campaign and Response Notes for Marketing

#### Defining Notes: Points to Consider

A note is a record attached to a business object. Notes capture nonstandard information received as you do business. When setting up notes for your application, you should consider the following points:

- Which new note types you want to add.
- How you want to map these new note types to business objects in your area.

#### Note Types

Note types are assigned to notes when they're created, to categorize them for future reference. During setup you can add new note types, and use a process called note type mapping to restrict them by business object type. When deciding which new note types you want to add, keep in mind how you want your users to search for, filter, and report on these notes.
Note Type Mappings
If you add new note types, you must map them to the business objects you use in your product area. Here are some points to consider when mapping note types:

- When you select a business object other than Default Note Types, you only see the note types that apply to that object.
- If no other note types appear, then note type mapping doesn’t exist for that object and the default note types are used. Select Default Note Types to see which default note types exist in the application.
- If you modify a default note type, it affects all the business objects that don’t have a note type mapping.

Suppose you decide to add a new note type of Analysis for your product area of Sales-Opportunity Management. You use note type mapping to map Analysis to the Opportunity business object. Now, every time you create or edit a note for an opportunity, you see Analysis as an available note type option.

When deciding which note types to map to business objects, you should keep the same considerations in mind that you did when you decided which note types to include.

Related Topics
- Extending Oracle Sales Cloud: How It Works

Manage Marketing Campaign Templates

Campaign Stage Design Elements: Explained
The campaign design interface provides the components you use to create stages and specify audiences, treatments, allocation, schedule, event details, additional options, and lead options. The elements available to specify for each stage are determined by the stage type you select.

The following table lists the stages and corresponding elements.

<table>
<thead>
<tr>
<th>Stage Type</th>
<th>Design Elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outbound</td>
<td>Audience</td>
</tr>
<tr>
<td></td>
<td>Treatments</td>
</tr>
<tr>
<td></td>
<td>Allocations</td>
</tr>
<tr>
<td></td>
<td>Schedule</td>
</tr>
<tr>
<td></td>
<td>Additional Options</td>
</tr>
<tr>
<td>Event</td>
<td>Event Details</td>
</tr>
<tr>
<td>Advertisement</td>
<td>Treatments</td>
</tr>
<tr>
<td>Lead Generation</td>
<td>Audience</td>
</tr>
<tr>
<td></td>
<td>Additional Options</td>
</tr>
</tbody>
</table>
The stage types and corresponding standard design elements are described in the sections that follow.

Note: Since this campaign design functionality is extensible, your enterprise may have customized design elements that are different from the standard set. For example, your enterprise may add additional attributes to an existing tab, or may add an additional tab to capture more stage attributes.

Outbound Stage
An outbound stage has the following design elements:

- Audience
  
The audience collectively describes all the contacts you want to target in the campaign. For an Outbound stage, the audience can include any combination of segment trees, segments, and lists. After the campaign is launched, you can view the audience members on the campaign members page.

- Treatments
  
  Treatment is a marketing term describing the content that is to be delivered to the target audience of a marketing campaign. You can add any number of treatments from the Treatments tab. Optionally, you can create one or more treatments to include in your campaign.

- Allocations
  
  Allocation describes the process of relating the selected audience members to the corresponding treatments, to determine what content each contact will receive.

<table>
<thead>
<tr>
<th>Mode</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple</td>
<td>You must allocate 100 percent of the selected audience row, whether segment or list, to a treatment.</td>
</tr>
<tr>
<td>Advanced</td>
<td>You can allocate by count or by percentage, and you can allocate a specific count or percentage of audience members to a control group. The control group is a random sampling of contacts who will not receive the campaign marketing material. You can evaluate the effectiveness of the campaign by comparing responses from control group members to responses from contacts who received the marketing material. In order to have your supplier process the full volume of transactions, you allocate more than 100 percent of the audience. For example, if your supplier is to send 5000 e-mails, and you want a control group of 500, you would allocate 5500 audience members and specify the control group size. When the stage executes, 5500 audience members will be loaded, but 500 will be identified as control group members, and excluded from the launch.</td>
</tr>
</tbody>
</table>

- Activities
  
  The activities tab shows activities and dates for the stage.

- Schedule
The schedule shows the start and end times of each system task that will be executed as part of the Load, List Export and Launch processes. By default, the Load, List Export and Launch processes run consecutively on the date scheduled for the stage, each step immediately following completion of its predecessor.

- Additional Options
  This page provides additional choices for loading campaign members.
- Monitor
  This page shows details of stage execution and provides the option to reexecute a stage.

**Event Stage**
An event stage has the Event Details design element, where you can select from the list of event types, select the venue, and optionally, add attachments.

**Advertisement Stage**
An advertisement stage has the following design elements:

- Treatments
  Treatment is a marketing term describing the content that is to be delivered to the target audience of a marketing campaign. You can add any number of treatments from the Treatments tab. Optionally, you can create one or more treatments to include in your campaign.
- Monitor
  This page shows details of stage execution and provides the option to reexecute a stage.

**Lead Generation Stage**
A lead generation stage has the following design elements:

- Audience
  The audience collectively describes all the contacts you want to target in the campaign. For a Lead Generation stage, the audience can include segment trees and segments, but not lists.
- Additional Options
  This page provides additional choices for loading campaign members.
- Monitor
  This page shows details of stage execution and provides the option to reexecute a stage.
- Lead Options
  After you have added audience segments and trees, select the audiences from which leads are to be created. For each audience, select the source code, so that the resultant leads can be tracked back to the corresponding marketing activity.

**Social Stage**
When you publish a social campaign using the social marketing feature, a multistage campaign with a Social site stage is created automatically, to enable response tracking.
Repeating Campaign Stages: Points to Consider

Within a single campaign, you can define stages that repeat on a daily, weekly or monthly basis for the duration you specify, and can funnel customers through stages that repeat at different intervals. You can create and manage repeating stages with varying degrees of complexity, such as the following:

- Repeating a single stage
- Repeating two stages with simple funneling
- Repeating two stages with complex funneling
- Pausing a campaign with repeating stages

Repeating a Single Stage
You can create a campaign to target customers who have bought a subscription to your ABC product, to remind them when their subscription is about to expire, and offer a discount if they choose to renew for a longer term.

Repeating Two Stages with Simple Funneling
Your campaign has two repeating stages:

- Stage One, which repeats monthly, looks for all customers who buy your ABC product, to send them an e-mail with a link to the online user forum for ABC product. Every time a user finds an answer from the forum, rather than making a support call, your company saves money.
- Stage Two, which repeats quarterly, is funneled from Stage One, and looks for all customers who accessed the online user forum, to send them an offer to purchase one year of support for ABC product at a 50 percent discount.

When the first instance of Stage Two begins, Stage One has already repeated three times. All customers who were targeted in the first three instances of Stage One, and who subsequently visited the online forum, qualify for the discount offer, which is sent to them in the first instance of Stage Two.

When the second instance of Stage Two begins, Stage One has already repeated six times. The first instance of Stage Two has already targeted customers from the first three instances of Stage One. To ensure that no eligible customer gets a duplicate e-mail with the same discount offer, Stage Two must compute a segment which includes only those customers targeted in the last three instances of Stage One.

Repeating Two Stages with Complex Funneling
Again, your campaign has two repeating stages:

- Stage One, which repeats quarterly, targets customers who have attended your webinar during the last three months, and sends them a coupon that is valid for one year and which they can redeem online at any time within the year.
- Stage Two, which repeats monthly, is funneled from Stage One to find customers who redeemed their coupon online, plus those who also attended your webinar, and send them invitations to a company event, scheduled near their location, where they can share their experience with other customers from the same area.
Stage Two repeats frequently, to ensure that customers have the opportunity to attend an event soon after they purchase the product and redeem the coupon. The first instance of Stage Two starts soon after the first instance of Stage One, but Stage Two then repeats more frequently than Stage One.

When the third instance of Stage One begins, six instances of Stage Two have already occurred. When the seventh instance of Stage Two begins, it is not enough to target the same customers as in the second instance of Stage One, since there may be some customers who were targeted in the first instance of Stage One but who redeemed their coupons later.

It is therefore better to compute a segment for every instance of Stage Two that meets the following conditions:

- Includes all customers targeted in all previous instances of Stage One and
- Excludes all customers targeted in all previous instances of Stage Two

In this way, all customers who were ever targeted by Stage One are considered for Stage Two, but no customer gets duplicate treatment for Stage Two.

Pausing a Campaign with Repeating Stages

If a campaign is paused, all repeating stages are skipped for the duration of the pause. When the dialog resumes after the pause, any repeating stages execute on their next scheduled occurrence.

Stage Schedule Automatic Tasks: Explained

You can monitor the execution status of all completed and active processes in your campaign, to check that the campaign stages are on track in terms of completion dates and times. Campaign execution tasks are grouped in three categories:

- Load
- List Export
- Launch

Each category has a mandatory automatic task plus optional, configurable tasks.

Load

The load task uses segments or lists to build the audience of campaign members targeted in a particular stage. Every segment has an associated load format that determines which campaign member attributes are to be loaded. Optionally, you can override this default format by selecting a different load format on the Additional Options tab.

You can tailor the load schedule by enabling optional tasks, either for manual intervention or for a custom action to be executed automatically. Once the load process completes successfully, you can view individual campaign members in the Campaign Execution details for the stage.

> Note: All segments defined for a stage are loaded at the same time. If a stage has multiple extremely large segments, it will take longer to load. In such cases, you may want to create duplicate stages, and add only one large segment to each iteration, for faster processing.

List Export

The list export task takes the data from the load task, generates a text file of recipients, and uploads the file to Oracle WebCenter Content. The ID of this text file, together with the ID of the treatment stored in Oracle WebCenter Content, is made available to the supplier associated with the treatment, in the Launch task.
Launch
The launch task does the following:

- If the supplier is Oracle Fusion E-Mail and Web Marketing, the e-mails are delivered using the content and campaign member data uploaded in the List Export phase.
- For third party suppliers, the list of campaign members and content is delivered to them based on their distribution profile settings.

Related Topics
- Why didn’t execution processing start for a stage?

Campaign Stage Additional Options: Explained
Additional options are available for Interaction and Lead Generation campaign stages.
This page has the following fields.

- Purge Cache
- Allowable Error Count
- Original System Reference
- Load Format
- Duplicate Look Back Days

Purge Cache
During the load process, the campaign members for each stage are loaded into the database. For segments, the selected contacts are also stored in the segmentation cache. The segmentation cache is purged automatically 24 hours after loading, so there is no need to select this option if more than 24 hours have elapsed since the last load cycle.

Allowable Error Count
Applies only to Lead Generation stages. Specify the maximum number of errors to allow before stopping the lead import process and the corresponding execution of the stage.

Original System Reference
Applies only to Lead Generation stages. Provide a source reference for the newly imported records.

Load Format
Specify the path and file name to a new mapping that will override the default load format for all segments in the stage.

Duplicate Look Back Days
Applies only to Lead Generation stages. Specify the number of days in the immediate past that the import process will check for duplicates, when importing new leads.

FAQs for Manage Marketing Campaign Templates
What happens if I create a campaign from a template or an existing campaign?

Most planning and design attributes are copied. When creating from a previous campaign or from a template, the following elements are copied:

- Attachments
- Stages
- Audiences associated with stages
- Treatments associated with stages

When creating a campaign from a template, tasks from any task template associated with the campaign template are copied:

> Note: It is the task template, rather than the campaign template, that determines which tasks are added to your copy. If the task template has changed since the campaign template was created, the tasks in your copy may not match those in the original.

The following elements are not copied:

- Campaign team
- Notes
- Allocations
- Schedules

What happens to existing campaigns if I update the campaign template?

Existing campaigns that were created from the template are unaffected. Your changes will only affect campaigns created after the template is updated. Campaign templates provide models to use as a basis when planning and designing multistage campaigns. When you use a template to create a multistage campaign, the template values are copied to the new campaign and the template’s purpose then ends for that campaign.

How can I change the quick add list when designing multistage campaigns?

The Quick Add lists contain collections of favorite treatments and audiences. The lists reflect the most recent changes, as users add and remove items. In the contextual area, click the Edit List link below the Quick Add list you want to change. A window opens, showing all the items available for that list. You can select one or more items and use the arrow buttons to move your selection into or out of the Quick Add list.
What's the difference between updating the count and refreshing the allocation?

Updating the count recalculates the number of members in segments and segment trees. This is useful when the segment rules have been changed, or if you are revisiting the campaign design after an interval where many more contacts may have been added to the segment.

Refreshing the allocation recalculates the matrix where audience members are allocated to treatments. You can refresh your allocation of numbers or of percentages, or you can change between numbers and percentages.

What happens if I select the notify option for a stage schedule activity?

When the activity completes, or if it encounters an error condition, an e-mail notification is sent to the owner named for this step in the schedule.

What happens if I deselect the Enforce Approvals check box after campaign approval has started?

While approval is pending, a campaign can't be changed. If you have authority to deselect Enforce Approvals, and decide that you don't want to seek approval for your campaign, you must first withdraw the approval request.

Campaign approval is enabled by a profile option. If approval is enforced, you must obtain approval before the campaign can be activated. You can override the requirement for mandatory approval only if you have the marketing vice president role.

Define Campaign Fulfillment System

Importing Marketing Suppliers: Explained

You can create or update marketing suppliers by navigating to Setup and Maintenance and selecting the Manage Marketing Supplier Details and Distribution Profiles task or by importing data through interface tables. To import suppliers, you use the tool of your preference to load the data then use scheduled processes to import the data. Having a good understanding of the application object, interface tables, and destination tables will help you prepare your import data.

Consider the following when importing marketing suppliers:

- Import interface tables, destination tables, and application entities
- Scheduled processes

Import Interface Tables, Destination Tables, and Application Entities

The marketing supplier consists of many entities that form the supplier. Each entity is tied to an interface table.
For information about available import attributes, see the Understanding File-Based Data Import and Export guide available on the Oracle Sales Cloud Help Center (https://docs.oracle.com/cloud/latest/salescs_gs/docs.htm). In the File Based Data Imports chapter, see the topic for your import object of interest, which includes links to reference files for target import objects.

The following table lists the interface tables, destination tables, and resulting application entities:

<table>
<thead>
<tr>
<th>Interface Tables</th>
<th>Destination Tables</th>
<th>Application Entities</th>
</tr>
</thead>
<tbody>
<tr>
<td>MKT_IMP_VENDORS</td>
<td>MKT_TM_VENDORS</td>
<td>Marketing Supplier</td>
</tr>
<tr>
<td>MKT_IMP_VENDOR_PROFILES</td>
<td>MKT_TM_DLV_PROFILE</td>
<td>Distribution Profile and Delivery Channel Parameters</td>
</tr>
<tr>
<td></td>
<td>MKT_TM_DLV_PRF_PARAMS</td>
<td></td>
</tr>
</tbody>
</table>

To obtain the unique IDs of existing application data, use the Define Data Export Setup and Maintenance task list.

Scheduled Processes

Navigate to Scheduled Processes to schedule the import of data from the interface tables to the destination tables.

The following table displays the process you can schedule to import marketing suppliers:

<table>
<thead>
<tr>
<th>Process Name</th>
<th>Process Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BulkVendorJob</td>
<td>Import Marketing Suppliers</td>
</tr>
</tbody>
</table>

Manage Marketing Treatment Templates

Importing Marketing Treatments: Explained

You can create or update marketing treatments by navigating to the Treatments work area and treatment templates by navigating to Setup and Maintenance and selecting the Manage Marketing Treatment Templates task, or by importing data through interface tables. To import treatments and treatment templates, you use the tool of your preference to load the data then use scheduled processes to import the data. Having a good understanding of the application objects, interface tables, and destination tables will help you prepare your import data.

Consider the following when importing treatments:

- Import interface tables, destination tables, and application entities
- Scheduled processes

Import Interface Tables, Destination Tables, and Application Entities

The treatment and treatment templates consists of many entities that form the treatment. Each entity is tied to an interface table.

For information about available import attributes, see the Understanding File-Based Data Import and Export guide available on the Oracle Sales Cloud Help Center (https://docs.oracle.com/cloud/latest/salescs_gs/docs.htm). In the File Based Data Imports chapter, see the topic for your import object of interest, which includes links to reference files for target import objects.
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The following table lists the interface tables, destination tables, and resulting application entities:

<table>
<thead>
<tr>
<th>Interface Tables</th>
<th>Destination Tables</th>
<th>Application Entities</th>
</tr>
</thead>
<tbody>
<tr>
<td>MKT_ IMP_ TREATMENTS</td>
<td>MKT_ TM_TREATMENTS</td>
<td>Marketing Treatment and Treatment Template</td>
</tr>
<tr>
<td>MKT_ IMP_ TRMT_ITEM_ASSOC</td>
<td>MKT_ TM_TRMT_ITEM_ASSOC</td>
<td>Treatment and Treatment Template Product and Product Group</td>
</tr>
<tr>
<td>MKT_ IMP_ TRMT_PROM_ASSOC</td>
<td>MKT_ TM_TRMT_PROM_ASSOC</td>
<td>Treatment Promotion</td>
</tr>
<tr>
<td>MKT_ IMP_ TRMT_URLS_ASSOC</td>
<td>MKT_ TM_TRMT_URLS_ASSOC</td>
<td>Treatment and Treatment Template Marketing URL</td>
</tr>
</tbody>
</table>

To obtain the unique IDs of existing application data, use the Define Data Export Setup and Maintenance task list.

You can import extensible, custom attributes in the same process as your treatment object. Design your object model extensions in Application Composer and generate the required artifacts to register your extensions and make them available for importing before you populate the corresponding extensible columns in the interface tables.

### Scheduled Processes

Navigate to Scheduled Processes to schedule the import of data from the interface tables to the destination tables.

The following table displays the process you can schedule to import treatments and treatment templates:

<table>
<thead>
<tr>
<th>Process Name</th>
<th>Process Display Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>BulkTreatmentsJob</td>
<td>Import Marketing Treatments</td>
</tr>
</tbody>
</table>

### 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 `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.

Using Conditional Content in Sales Campaign Templates: Explained
Conditional content provides the ability to present relevant information to individual email recipients without having to create multiple messages. There are two ways to generate conditional content within a sales campaign template:
- Block statement personalization
- If-Then-Else personalization
Conditional content and merge fields are available in both HTML and Text format emails.

**Block Statement Personalization**

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

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

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

The following table lists components of the block personalization element.

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

The following is an example of a block personalization element:

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

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

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

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

**Inserting a Block Statement**

To insert a block statement, do the following:

1. Display the email template in the HTML editor.
2. Place the cursor in the location where you want the insert the block.
3. Create the Insert Block statement as follows:

   o In the editor toolbar, select **Insert Block** from the rule conditions drop-down list.
   o In the next drop-down list, select the record the field comes from: Contact, Account, or Campaign.
   o In the next drop-down list, select the field in the record.
   o Click **Insert**.
4. Create a Define Block component as follows:
   - In the drop-down list immediately above the email tag, select **Create Block**. A `$(DefineBlock "")` and `$(EndBlock)` statement appear in the text.
   - Type a field value within the quotation marks of the `$(DefineBlock "")` statement. This is the value that drives the content displayed in the block.
   - Type the text that you want to insert into the email between the `$(DefineBlock "")` and `$(EndBlock)` tags.

5. Repeat Step 4 until you have added all the Define Block components that you need.

**If-Then-Else Personalization**

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

- If the merge field is defined, the text remains in the outgoing email.
- If the merge field is not defined, the text is removed from the outgoing email.

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

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

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

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

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

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

For example, to modify the email with a condition for accounts in the state of California, you use the following statement:
$(if ${Account.Bill to State} == "CA") Join us all month long for special events and workshops held in each of our California locations.

$(else) Join us all month long for weekly online workshops and special offers at www.mycompany.com/events. $(endif)

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

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

Inserting an If-Then-Else Personalization Statement

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

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

Configure Marketing Campaigns and Responses

Setting Up E-Mail Sales Campaigns

Sales managers and salespeople use sales campaigns to promote a specific product or event to specific customers in a personalized e-mail campaign. These campaigns can contain links that recipients can respond to, and their responses can be tracked. You can set up language-specific versions of templates, headers, and footers, to use in international campaigns. This topic outlines the steps that you perform to set up a sales campaign.

Validating the E-Mail Server

The e-mail server provides:

- The e-mail sending daemon that delivers e-mail
- The bounce-handling daemon that tracks e-mails that cannot be delivered
- The click-through daemon that tracks e-mail recipient responses

To validate the e-mail server, perform the following steps:

1. Navigate to the Setup and Maintenance work area and search for Manage Marketing Supplier Details and Distribution Profiles task.
2. In the **Distribution Profiles** area, edit the **E-Mail Profile** to validate the method of delivering marketing content to a supplier for campaign fulfillment.

3. In **Delivery Channel**, select **ESD e-mail** and verify the following:
   - CTD host
   - CTD port
   - BHD
   - CTD protocol

4. Click **Cancel** or click **Save** if you made changes.

### Setting Up Headers and Footers

You create header and footer content for e-mail messages delivered as part of your e-mail sales campaign. The e-mail header and footer can be assigned to a specific organization unit and language. It can be in HTML or text format and can be marked for restricted viewing. To create header and footer content, perform the following steps:

1. Navigate to the Setup and Maintenance work area and search for **Manage Marketing E-Mail Headers and Footers** task.
2. Select **Create** from the **Actions** list.
3. Enter the following information on the **Create E-Mail Header or Footer** page:
   - **Name**: Enter a descriptive name.
   - **Language**: Select American English or whatever language that you want.
   - **Select the Primary check box.**
   - **Select Header** in the Type field.
   - In the HTML or Plain Text subtab, set up your header.
   - Click **Save and Close**.
4. Repeat the steps 2 and 3 to create a footer. Be sure to select **Footer** for Type.

### Setting Up the Marketing Template

Use treatment templates to help you quickly create:

- Treatments
- Channel specific marketing promotions
- Marketing messages
- Fulfillment instructions to assign to campaigns

To create a treatment template, perform the following steps:

1. Open the **Manage Marketing Treatment Templates** page.
2. Click the **Create** icon.
3. On the **Create Treatment Template** page, enter the required information.
4. Select the **Active** check box.
5. Either upload your HTML template as a file, or paste it in the work area.
6. Click **Save and Close**.

### Marketing Profile Options: Explained

Profile options are configurable options that affect application operations. Values defined at the user level take precedence over those at the site level. If a value is not defined at the user level, the site level value is used.
The effect of setting each of the marketing profile options are described under the following broad sections:

- Define Treatments
- Design Multistage Campaigns
- Execute Campaigns
- Manage Budgets
- Manage Custom Mappings and Synchronization
- Define File-Based Data Import and Data Migration
- Define Segmentation Manager

### Define Treatments

The following table lists the profile options that affect Treatments:

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow Treatment Template</td>
<td>Specify a default treatment template.</td>
</tr>
<tr>
<td>E-mail Treatment Distribution Profile Default</td>
<td>Select the fulfillment supplier’s distribution profile used as the default value when creating e-mail treatments.</td>
</tr>
<tr>
<td>E-mail Treatment Supplier Default</td>
<td>Select the fulfillment supplier used as the default value when creating e-mail treatments.</td>
</tr>
<tr>
<td>Read Receipt Response Form Default</td>
<td>Enable the automatic use of read receipt tracking to HTML e-mail treatment content. This profile option can be updated at the user level.</td>
</tr>
<tr>
<td>SMS Treatment Distribution Profile Default</td>
<td>Select the fulfillment supplier’s distribution profile used as the default value when creating short message service treatments.</td>
</tr>
<tr>
<td>SMS Treatment Supplier Default</td>
<td>Select the fulfillment supplier used as the default value when creating short message service treatments.</td>
</tr>
<tr>
<td>Treatment Content Directory</td>
<td>Specify the folder path in Oracle WebCenter Content to store marketing treatment content.</td>
</tr>
<tr>
<td>Treatment Template Directory</td>
<td>Specify the folder path in Oracle WebCenter Content to store marketing treatment templates.</td>
</tr>
<tr>
<td>Treatment Template Name Prefix</td>
<td>Specify a default prefix for treatment template names. This profile option can be updated at the user level.</td>
</tr>
</tbody>
</table>

### Design Multistage Campaigns

The following table lists the profile options that affect multistage campaigns:

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ad Hoc Campaign Approval</td>
<td>Enable the campaign owner to select the approver from a list of resources. If the option is not enabled, the first approver is the campaign owner’s manager.</td>
</tr>
</tbody>
</table>
### Profile Option Display Name | Effect
--- | ---
Approval Timeout Interval | Specify the number of days an approver has to respond before the approval request times out.  
Enforce Campaign Approval Enabled | Enable application verification of the campaign approved status before the campaign is launched.  
Hide Show Sales Campaign Repeat Settings | Allows user to hide or show the sales campaign repeat settings region. The default value is to show the sales campaign repeat settings.  
Sales Campaign Maximum Contacts | Specify the maximum number of contacts that sales users can target in a sales campaign launch.

### Execute Campaigns

The following table lists the execute campaigns profile options:

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
</table>
| **Campaign Lead Generation Load Format Default** | Select the default path and name of the file containing the column mapping used to load sales leads during campaign stage execution. The default load formats are displayed in the Additional Options tab when designing a lead generation stage. This profile option can be updated at the user level. Oracle Sales Cloud passes the campaign lead generation load format to the segmentation server when a stage is being loaded and launched.  
| **Campaign Member Load Format Default** | Select the default path and name of the file containing the column mapping used to load campaign members during campaign stage execution. The default load formats are displayed in the Additional Options tab when designing an interaction stage. This profile option can be updated at the user level. Oracle Sales Cloud passes the campaign member load format to the segmentation server when a stage or mini campaign is being loaded and launched.  
| **Recipient File Folder Default** | Specify the Oracle WebCenter Content directory path for member list files used for marketing campaign fulfillment.  
| **Search Marketing Campaigns Enabled** | Enable the display of Search Marketing Campaigns, a tab in the Campaigns Overview user interface containing marketing campaigns using search engine providers.  

### Manage Budgets

The following table lists the profile options that affect the management of budgets:

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
</table>
| **Budget Fund Request and Claim Approval Administrator** | Select the recipient of notifications when an approver cannot be determined, who is qualified to respond to the notification, and can modify approval configurations.  
| **Budget Funding Tolerance Default** | Specify the funding tolerance percent to use when creating budgets. The percentage is used to calculate an allowable amount that total fund requests can exceed the budgeted amount.  
| **Claim Submission Deadline Default** | Specify the number of days added to the budget creation date to determine the default claim submission deadline date.
Manage Responses

The following table lists the profile options for the management of marketing responses:

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fund Request Submission Deadline Default</td>
<td>Specify the number of days added to the budget creation date to determine the default fund request submission deadline date.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Response to Lead Mapping</td>
<td>Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes when a Response is converted to a Lead.</td>
</tr>
<tr>
<td>Response to Opportunity Mapping</td>
<td>Specify the mapping file name created in Application Composer, Copy Maps. This file is used to map objects and attributes when a Response is converted to an Opportunity.</td>
</tr>
<tr>
<td>Marketing Suspect Synchronization Batch Size</td>
<td>Specify the number of rows to batch during synchronization of records between the marketing suspects table and the customer party table.</td>
</tr>
<tr>
<td>Marketing Suspect Synchronization Segment Name</td>
<td>Specify the name of the segment that identifies the marketing suspect contacts to be excluded from the customer party table during the campaign load process.</td>
</tr>
</tbody>
</table>

Define File-Based Data Import and Data Migration

The following table lists the profile options for marketing data migration and for define file-based data import:

<table>
<thead>
<tr>
<th>Option Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing Migration Look Back Period</td>
<td>Specify a number of days to precede the migration date, so that all marketing records modified before the specified number of days are migrated prior to the downtime period.</td>
</tr>
<tr>
<td>Migrate Siebel Marketing Prospect Data</td>
<td>Specify the way in which marketing prospect data is migrated.</td>
</tr>
<tr>
<td>WebCenter Content Applet Enabled</td>
<td>Enable Oracle WebCenter Content applet to browse and load large files when creating file import processing activities.</td>
</tr>
</tbody>
</table>

Define Segmentation Manager

The following table lists the profile option for the segmentation manager:

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Segmentation Server Default</td>
<td>Specify the default segmentation server hostname.</td>
</tr>
</tbody>
</table>
Manage Social Marketing Connectors

Oracle Social Marketing and Oracle Sales Cloud Marketing: How They Work Together

This topic describes how Oracle Social Marketing and Oracle Sales Cloud Marketing interact to help you create outbound e-mail campaigns using Oracle Social Marketing. Using Oracle Social Marketing, you can create social media content (Web forms on Facebook pages, Twitter Tweets, and so forth) and then track visitors’ responses to this content in an Oracle Sales Cloud marketing campaign. You can also use Oracle Sales Cloud Marketing to create outbound e-mail campaigns that point to social media content like Facebook pages or tabs. You can track visitors’ interactions with the content in an Oracle Sales Cloud marketing campaign.

The following steps correspond to the high-level process described in the figure:

1. Create a Web form on a Facebook tab, and publish it.
2. A Marketing campaign of type Social Site is automatically created.
3. A visitor visits the site and completes and submits the Web form.
4. The Marketing campaign gathers responses from visitors.
5. A marketer reviews the submitted results.
6. A marketer launches an outbound campaign (such as an e-mail including a link).
7. A recipient clicks on the link (for example, to a Facebook page containing a Web form) or clicks a “Tweet This” link to create a Twitter Tweet based on the campaign’s content.
8. The Marketing campaign gathers responses.
9. A marketer reviews the responses.
The following figure illustrates the interaction.

**Facebook Tabs**

After you have successfully connected to Oracle Social Marketing, you can create a Facebook tab that includes one or more Web forms that visitors can complete. When you publish a Web form to Facebook that you have created using Oracle Social Marketing, Oracle Sales Cloud automatically defines a new Marketing multistage campaign that displays a subset of the campaign's fields. The Oracle Sales Cloud campaign contains only a single stage, of the type Social Site. The campaign:

- Collects the responses from visitors who visit your Facebook page and fill out your Web form
- Tracks responses based on unique source codes assigned to each Web form
If you choose, you can associate the campaign containing the Social Site stage with another Oracle Sales Cloud Marketing multistage campaign. Your Facebook tab can contain multiple Web forms, or you can have multiple Facebook tabs, but each response includes its own unique code for tracking purposes.

Campaign Responses

After your Facebook tab has been published, visitors can view it and complete the Web form. When a visitor submits a Web form, a response is automatically generated and included in the Oracle Sales Cloud Marketing campaign. When a visitor to the site provides a response such as filling out a Web form, the relevant information is passed back to Oracle Sales Cloud. Responses are captured using special tracking information that is included in the links that a visitor clicks to access the campaign content. Using this tracking information, Oracle Sales Cloud can determine which visitors responded to which campaigns, and what sort of responses they made.

Marketers can go to the Campaign work area in Oracle Sales Cloud Marketing and view the responses in the Results area of the social campaign. The Responses tab shows all responses to the campaign, including the date and the name of the respondent.

E-Mail and Web Page Customization for Outbound Campaigns

When you create e-mail or Web pages as part of an Oracle Sales Cloud outbound campaign, you can include links to Facebook pages that include your content, or provide links that allow your recipients to send your content to their contacts using Twitter.

Responses to Outbound Campaigns

Oracle Sales Cloud Marketing tracks recipient or visitor responses to your campaign content, including:

- Clicking links to Facebook pages included in e-mail or on Web pages.
- Filling out and submitting Web forms created using Oracle Social Marketing.
- Sending preconfigured Twitter Tweets to their own Twitter feeds.

Oracle Sales Cloud Marketing includes the response information in the Results area of the social campaign. Marketers can visit the campaign’s Responses tab to view the results.

Related Topics

- What’s the difference between a social campaign and a marketing campaign?
- Using Twitter Tweets in Marketing Messages: Procedure
- Treatments: Explained
- Defining Facebook Tabs in Oracle Social Marketing: Worked Example
16 **Understanding E-Mail Server**

**E-Mail Architecture for Marketing: How It Fits Together**

E-mail marketing includes a combination of components designed to support high volume, personalized e-mail messages and track e-mail bounces and click-through responses. This topic provides an overview of the following e-mail marketing installation components and how they fit together:

- Business Intelligence and Oracle WebCenter Content
- E-mail Sending Daemon (ESD) and the Mail Transfer Agent (MTA)
- Bounce Handling Daemon (BHD)
- Click-Through Daemon (CTD)
The following figure displays an example of a typical architectural structure for e-mail marketing server components:

Business Intelligence and Oracle WebCenter Content

Segmentation is the practice of dividing a customer base into groups that are similar in specific ways such as demographics or past purchases. Marketers use segmentation to target groups of customers and allocate marketing resources effectively. Segments and segment trees are selected in marketing campaigns to receive marketing communications and to generate leads. Oracle Marketing Segmentation is fully integrated with Oracle Business Intelligence and uses the same metadata as the Business Intelligence reporting tools. When an e-mail campaign is launched, the contact details are collected using the information in the Business Intelligence Repository. The details are formatted using the Business Intelligence server, and then
stored in Oracle WebCenter Content. Oracle WebCenter Content also stores the campaign e-mail content, headers, footers, and attachments specified during campaign design.

E-Mail Sending Daemon and the Mail Transfer Agent
The e-mail sending daemon assembles each outbound e-mail message for a campaign. It then sends each message to the outbound mail transfer agent (MTA) for delivery.

The e-mail sending daemon listens for SOAP requests from the marketing e-mail server. A SOAP request includes the required file names found in Oracle WebCenter Content. The e-mail sending daemon must be able to:

- Communicate with one or more outbound mail transfer agents to send mailings over the Internet
- Inform the marketing e-mail server when the message transfer is complete
- Provide details of synchronous e-mail bounces for delivery errors that occurred while it communicated using simple mail transfer protocol (SMTP) to the mail transfer agents

The e-mail sending daemon is usually placed within the corporate network, behind the demilitarized zone (DMZ). However, it can also be placed inside the DMZ or outside the firewall, if there is a port opened to connect to the marketing e-mail server and Oracle WebCenter Content.

Bounce Handling Daemon
The bounce handling daemon tracks e-mail messages that cannot be delivered, parses the returned e-mail messages, and records the cause of the e-mail bounce. You can place the bounce handling daemon in the DMZ. However, you can also place it behind an inbound mail transfer agent. The approach that you take depends on the configuration of your network, DMZ, existing inbound mail transfer agent, and firewall.

Click-Through Daemon
The click-through daemon tracks clicks made by the e-mail recipient on trackable URLs included in the e-mail content. It listens for HTTP requests, such as forward to a friend, subscribe to list, and one click unsubscribe.

You can place the click-through daemon in the DMZ. Using SOAP, you can also place it inside or outside the firewall, if a port is opened that allows it to connect to the marketing e-mail server. Web proxy servers are used to route the HTTP requests to the click-through daemon server.

Manage Marketing E-Mail Sending Daemon: Explained
The e-mail marketing server is a combination of components designed to support high volume, personalized e-mail messages, and to track e-mail bounces and click-through responses. The e-mail sending daemon is the outbound component for campaign e-mail messages.

This topic includes the following:

- Outbound mail transfer agents
- Oracle WebCenter Content connection
- Volume thresholds and throughput
- Spam scoring server settings
- E-mail sending daemon properties file
Outbound Mail Transfer Agents

The e-mail sending daemon (ESD) requires one or more outbound mail transfer agents (MTAs) to deliver e-mail over the Internet. You specify the host and port numbers of your MTAs in the ESD properties file. If you specify multiple MTAs, then the e-mail sending daemon uses additional MTAs as a backup. For example, when the e-mail sending daemon starts, it uses the first MTA listed in the properties file. If the MTA fails, the next MTA listed is used. To use the first MTA, restart the e-mail sending daemon by starting the server again.

Oracle WebCenter Content

The e-mail sending daemon listens for SOAP requests from the marketing e-mail server. A SOAP request includes the required file names found in Oracle WebCenter Content. You specify access information for Oracle WebCenter Content in the ESD properties file.

Volume Thresholds and Throughput

You can specify or adjust the threshold value property that determines when the campaign priority must be honored. When the threshold is reached, the priority value specified during campaign design is used. Processing for campaigns with less priority is temporarily paused until the processing for higher priority campaigns is completed.

You can limit the maximum throughput rate for the e-mail sending daemon, specified in messages per second.

- A value of -1 is the highest throughput rate possible and is the default setting.
- A value of 250-350 supports a medium level of throughput.
- A value of 250-50 supports a low level of throughput.

Spam Scoring Server Settings

You can install SpamAssassin to assist marketers in creating campaign content that is less likely to be identified as junk mail by the recipients e-mail software. SpamAssassin is an open-source spam scoring software provided by Apache Software Foundation. Once you have completed the installation steps, update the e-mail sending daemon properties file with the software location. You can then report the spam score and score reasons when testing e-mail campaign content.

ESD Properties File

You can modify the e-mail sending daemon properties file if changes are required after installation.

The following table describes the e-mail sending daemon properties file `esd.properties`:

<table>
<thead>
<tr>
<th>Property Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>esd.mailServers</td>
<td>The MTA server, including host name and port number, used by the ESD to deliver e-mails. When listing more than one MTA, use a comma between each MTA.</td>
</tr>
<tr>
<td>esd.contentHandler.server</td>
<td>Oracle WebCenter Content URL used to access the content server.</td>
</tr>
<tr>
<td>esd.mountPoint</td>
<td>The absolute path of the file directory where the ESD writes the content files.</td>
</tr>
<tr>
<td>esd.handler.bounce.webservice.url</td>
<td>The web service URL used by the ESD to log a bounced e-mail message. To locate this web service, search for MkDialogsCampMemberUpdateComposite composite deployed within the Marketing SOA environment.</td>
</tr>
<tr>
<td>Property Name</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>esd. handler. updateStatus. webservice.url</td>
<td>The web service URL used by the ESD to log a completed process. To locate this web service, search for MktDialogsCampFulfillmentStatusComposite composite deployed within Marketing SOA environment</td>
</tr>
<tr>
<td>esd. priorityThreshold</td>
<td>The threshold that determines when the campaign priority must be honored.</td>
</tr>
<tr>
<td>esd. smtp. throttleVal</td>
<td>This property determines the e-mail throughput rate for the system.</td>
</tr>
<tr>
<td>esd.spamPort</td>
<td>The port number of the server where SpamAssassin is installed. The default port number is 783.</td>
</tr>
<tr>
<td>esd.spamServer</td>
<td>The host name or IP address of the server where SpamAssassin is installed.</td>
</tr>
<tr>
<td>esd. reportSpamErrors</td>
<td>The Boolean value used to enable the display of SpamAssassin scoring when previewing marketing e-mails.</td>
</tr>
</tbody>
</table>

Installing the e-mail sending daemon is part of the provisioning process. For more information on provisioning, see the Oracle Sales Cloud Quick Installation Guide.
17 Understanding Segmentation Manager

Marketing Segmentation: Architectural Overview

Marketing Segmentation is fully integrated with Oracle Business Intelligence Enterprise Edition (OBIEE) and uses the same metadata as the Oracle Business Intelligence Applications reporting tools.

Marketing Segmentation Architecture

You interact with information in Oracle Business Intelligence Applications and Oracle Transactional Business Intelligence using Oracle BI (Business Intelligence) Enterprise Edition components.
The following figure outlines the marketing segmentation architecture.

The Oracle BI Applications warehouse is a unified data repository for all customer-centric data and is used to support the analytical requirements of Oracle Business Intelligence Applications.

Oracle Transactional Business Intelligence:

- Is real-time self service component reporting directly off Oracle Sales Cloud application data where you can create your own reports using prepackaged functional metadata
- Is co-located and semantically integrated with the data warehousing metadata
- Can read security, flexfields, and trees from the Oracle Sales Cloud marketing application
The RPD layer is the repository file that stores metadata. In order to use any BI tool that depends on its own metadata layer, such as BI Answers and BI Dashboards, the metadata repository must describe how queries are constructed against the relational data sources. RPD files are used to define the physical layer.

The BI presentation layer stores the Segment, Segment Tree and List Format definitions in the Web Catalog. The catalog stores content created with the Segment Designer, Segment Tree Designer, and List Format designer. Content can be organized into folders, which are either shared or private. Types of content that can be stored in the Web Catalog include segments, segment trees, list formats, as well as reports, filters, and dashboards created with Oracle BI Answers.

Related Topics

- Campaign and Audience Components: How They Work Together

Marketing Segmentation: Implementation Planning

This topic lists some of the considerations to take into account when planning your implementation of the Marketing Segmentation application. You must manage the necessary configuration, integration, and metadata settings to fully enable the marketing segmentation functionality.

Define Segmentation Manager

The first part of the configuration happens when the OBIEE server is being implemented and configured. These tasks are outlined as follows:

- Manage Segmentation Manager Configuration Parameters

  Configure the deployment parameters, default values, and connection pools to the database server, and generate list export formats to the database for the underlying business intelligence infrastructure.

- Manage Segmentation Manager Enterprise Content Management Integration

  You can configure the deployment and connection parameters for the Oracle Enterprise Content Management server repository using Oracle Enterprise Manager. You do not need to configure any connections for Oracle Sales Cloud users. When campaigns are launched, the target audience contact details are collected using the information in the Business Intelligence Repository, are formatted using the Business Intelligence server, and then they’re stored in a content server. You, as the administrator, can configure for connections to the Oracle Content Server for Sales Cloud application users.

- Manage Segmentation Manager Metadata for Marketing

  Create and maintain the segmentation metadata, such as target levels, presentation catalog subject areas, and schema mappings, used when creating segments, segment trees, and list formats.

Manage List Formats and Contact Planning Rules

The second part of the configuration is done by a Marketing Operations Manager role within the Marketing Segmentation application. Do the following:

- Manage List Formats
The Marketing Segmentation application comes with predefined list formats to generate segments for campaign execution, e-mail personalization, and lead creation. If you want to generate a segment in a different format, such as including different or custom attributes in the output, then a new list format can be created.

- Manage Segmentation Manager Contact Planning Rules
  Define the frequency and volume constraints that can be applied globally or against a specific customer communication channel. Use the segment inclusion criteria to define the conditions under which the rules apply. Allow a company to place volume, frequency, and recency rules on all forms of communication across customer, channel, and program dimensions. Define a set of segments that represent the segments of the population that will be included. For example, a segment that includes all the customers who have chosen to accept e-mail.

Related Topics
- Marketing Segmentation: Functional Overview
- How is the segment path determined?
- Campaign and Audience Components: How They Work Together

Marketing Segmentation Administration: Highlights

Marketing segmentation provides customer segments, personalization merge fields, contact planning rules, list formats, and is fully integrated with Oracle Business Intelligence. It uses the same metadata as the Business Intelligence reporting tools. Consequently, marketing segmentation has access to a library of available customer attributes, calculations, derived metrics, and data mining models. Oracle Enterprise Manager incorporates the integration points between Oracle Marketing Segmentation and Universal Content Repository for the storage of lists generated for export.

Configuring segmentation for Marketing includes the management of the following tasks:
- Segmentation Manager Configuration Parameters
- Marketing List Formats
- Content Management Integration
- Contact Planning Rules
- Marketing Module Metadata
- Security Mappings for Users of Marketing Segmentation

Oracle Marketing Using Marketing Segmentation Guide describes the segmentation configuration tasks for marketing.

Segmentation Manager Configuration Parameters

You can configure the deployment parameters, default values, and connection pools to the database server, and generate list export formats.

- For information about setting up marketing module parameters, see the Oracle Marketing Using Marketing Segmentation Guide on Oracle Technology Network at http://www.oracle.com/technetwork.
Marketing List Formats

List Formats define the layout of files that you can use for a variety of purposes. While Marketing Segmentation supports five list format types, Oracle Marketing uses four formats. List Export Formats are used to define the customer data and other campaign-related information that is exported so that the campaign stage can be executed. For example, a list export format may provide a list file containing customers and addresses to a direct mail fulfillment supplier for printing and mailing or to create a call list to distribute to employees in a sales organization. E-Mail Server Formats are used to export the members of an e-mail campaign to the Oracle E-Mail Marketing Server. The e-mail personalization format is the type of E-Mail Server format that provides the columns that can be used as merge fields to personalize the e-mail message sent to each recipient. Campaign Load Formats are used to load the individual members of a segment or a segment tree to the campaign. Data Load Formats are used to import leads resulting from a multistage campaign, lead generation stage.

- For information about marketing list formats, see the Oracle Marketing Using Marketing Segmentation Guide on Oracle Technology Network at http://www.oracle.com/technetwork.

- To provide default campaign load and data load formats for campaigns, navigate to Setup and Maintenance and select the Manage Marketing Profile Options task to update the Campaign Member Load Format Default and Campaign Lead Generation Load Format Default profiles.

Content Management Integration

Configure deployment and connection parameters for Oracle Enterprise Content Management server repository using Oracle Enterprise Manager.

- For information about content management integration, see the Middleware System Administrator’s Guide for Oracle Business Intelligence Enterprise Edition.

Contact Planning Rules

Contact planning rules allow you to define contact frequency and volume constraints that can be applied globally or against a specific customer communication channel. Contact planning rules use segment inclusion criteria to define the conditions where the rules apply.

- For information about contact planning rules, see the Oracle Marketing Using Marketing Segmentation Guide on Oracle Technology Network at http://www.oracle.com/technetwork.

Marketing Module Metadata

To support the segmentation process, the Oracle Business Intelligence Administration Tool provides a set of Marketing metadata, such as target levels, presentation catalogs, sampling factors, and schema mappings.

- For information about marketing segmentation metadata, see the Oracle Marketing Using Marketing Segmentation Guide on Oracle Technology Network at http://www.oracle.com/technetwork.

Security Mappings for Users of Marketing Segmentation

- For information about the security mappings and access levels specific for users of Marketing Segmentation, see the Oracle Marketing Using Marketing Segmentation Guide on Oracle Technology Network at http://www.oracle.com/technetwork.
Marketing Segments and Segment Trees

Segmentation is the practice of dividing a customer base into groups that are similar in specific ways, such as demographics or past purchases. Marketers use segmentation to target groups of customers and allocate marketing resources effectively. Segments and segment trees are selected in marketing campaigns to receive marketing communications and to generate leads. You can create and manage segments and segment trees.

Manage Marketing Segments and Segment Trees

- For information about creating marketing segments and segment trees, see the Using Marketing Segments and Segment Trees chapter in the Marketing Segmentation Guide. Refer to Oracle Marketing Using Marketing Segmentation Guide on Oracle Technology Network at http://www.oracle.com/technetwork.

Configuring Custom Subject Areas for Segmentation: Points to Consider

This topic outlines the setup required to target some organization contacts using criteria from a custom object that has a relationship with an Organization Customer (B2B). It also specifies some setup variations for configuring custom objects related to B2C Customers (Consumers) and custom objects related to contacts.

Configuring Custom Subject Areas in Segments

The following example is used to illustrate your task. You are a B2B company and want to target organization contacts in a marketing campaign. The contacts work for organizations that have placed an order with your company in the past month.

Before You Begin

The following lists the tasks that you must perform before you begin to configure the custom subject area for segmentation:

- Create a custom object named **Orders** and include custom fields such as date, amount, product and so on using the dynamic choice list. Select **Account** as the target object for the dynamic choice list to allow you to select the customer for which each new order is required. This action creates a relationship between **Order** and **Account**.
- Create a work area for the custom **Order** object and expose the necessary fields in the Overview, Create and Detail pages.
- Create data records for the **Order** object either through the UI, through Import or through web services. When creating records, make sure that you select the **Account** for which each **Order** is required.
- Create a custom subject area for the **Order** object and expose that subject area for segmentation. When selecting fields to include in the custom subject area you must choose the **Party ID** from the **Account** object.

Custom Subject Area Segment Configuration

Do the following to configure the custom subject area for segmentation:

1. Associate the subject area to one or multiple Target Levels.
In this example, the custom object has a relationship to Account only, so it must be related to the Real Time Customers target level only. The Qualifying Identifier must be set to the same level as the target level (Customers Real Time) and the Mapped Field must be set to the Party ID of the Account object. This association ensures that Marketing Segmentation uses the Party ID to identify and count individual customers.


Set the Qualifying Identifier to the same level as the target level (Real Time Customers) and set the mapped field to the Party ID of the Account object. This association ensures that Marketing Segmentation uses the Party ID as the parameter when querying the database for the set of customer data to include in the segment.

Using Custom Subject Areas in Segments

Now that the custom subject area has been set up and Marketing Segmentation has been configured, you can now use the custom subject area when creating segments. Using this example, the target for the segment is individual contacts that work for organizations which have an order. You need to create a segment that targets Real Time Customers and then nest (relate) the Real Time Contacts subject area.

Perform the following steps:

1. Navigate to the Audience work area and select Create Segment. Enter a name for your segment, select the Real Time Contacts target level, and click Save and Design. The Segmentation UI will be displayed.

2. Click the Select Another Target Level icon in the upper right corner (next to the Save icon) and select the Real Time Customers target level.

3. Select the Add/Remove Subject Areas icon in the upper left corner of the screen (in the Subject Area section next to Refresh icon). Select the new custom Orders subject area that you previously created.

4. Create the segment criteria for the set of Organizations that you want to target (based on orders, or customer attributes), then save the segment.

   Note: This segment will not appear in Marketing Segmentation UI at any time. It is a nested segment used by the Contacts Real Time segment that is being created.

5. Once the Customer level segment is saved, click Go back to segment_name link in the upper left of the Segment Designer section. The segment_name is the name of the segment that you are designing. This action returns to the original segment that is at the Contact level and the Customer level segment will be nested as the first criteria.

6. Add any other criteria necessary to the segment, at the customer or contact level (customer name, contact e-mail, and so on).

7. Save the segment and update counts.

   The counts should reflect the number of contacts that are related to the companies which meet the Orders criteria (plus any other criteria entered into the segment).

Custom Objects Related to B2C Customers (Consumers)

The setup and process for creating the custom subject area for custom objects related to Consumers is almost identical to the process outlined in the previous example with a few exceptions as follows:

- When creating the custom object and inserting the dynamic choice list, the target object must be the Contact object. This object relates the Person Customer to the custom object (instead of an Account).
- When setting up the custom subject area, the Party ID of the Contact object must be added to the subject area in the Field selection step.
• When configuring segmentation on the custom subject area, the target level must be set to **Real Time Consumers**. The **Qualifying Identifier** must be set to **Consumers Real Time** and the **Party ID** from the **Contact** object must be used as the mapped field in both steps.

• A nested segment is not needed when you create a segment. The custom subject area is related directly to the person customer (consumer) so that object can be used in a segment that is targeting consumers.

### Custom Objects Related to Contacts

The setup and process for creating the custom subject area for custom objects related to Contacts is almost identical to the process outlined in the previous example with a few exceptions as follows:

• When creating the custom object and inserting the dynamic choice list, the target object must be the **Customer Contact Profile** object. This object relates the Contact to the custom object (instead of an Account or Person Customer).

• When setting up the custom subject area, the **Party ID** of the **Customer Contact Profile** object must be added to the subject area in the Field selection step.

• When configuring segmentation on the custom subject area, the target level must be set to **Real Time Contacts**. The **Qualifying Identifier** must be set to **Contacts Real Time** and the **Party ID** from the **Customer Contact Profile** object must be used as the mapped field in both steps.

• A nested segment is not needed when you create a segment. The custom subject area is related directly to the customer contact (contact) so that object can be used in a segment that is targeting contacts.

**Related Topics**

• Can I change a custom subject area's primary object?

• What happens if I change a custom subject area after it is published?

• Custom Subject Areas: Explained
18 Setting Up User Assistance

Setting Up Help: Overview

Applications Help works without you having to set anything up. You can do the optional setup, mainly if you want to customize help. Select the help features you want, perform tasks in the Define Help Configuration task list, and customize help.

Help Feature Choices

In the Setup and Maintenance work area, select help feature choices on the Features page when you configure your offerings. Feature choices determine:

- What’s available in Applications Help
- What you can configure to set up help

The first feature choice for help is Local Installation of Help, and you must leave it selected. Other feature choices are:

- Access to Internet-Based Help Features
- Help Customization
- Custom Help Security

Define Help Configuration Task List

In the Setup and Maintenance work area, use these tasks in the Define Help Configuration task list to configure Applications Help for all users:

- **Set Help Options:**
  - Determine if certain features of Applications Help are available to users.
  - Control how aspects of Applications Help work.

- **Assign Help Text Administration Duty:** Contact your security administrator to determine who can customize help.

- **Manage Help Security Groups:** Set up security to limit access to certain help files.

Help Customization

After you configure help, you can review the predefined help and see if you want to add or customize any content. You can also customize help text that appears on the page, for example hints.

Related Topics

- Features: Explained
Set Help Options

Setting Up Access to Web Sites from Applications Help: Procedure

You can determine the Web sites that users can access from Applications Help.

Setting Up Access to External Web Sites

Follow these steps:

1. In the Setup and Maintenance work area, open the Features page for your offering.
2. Leave the Location Installation of Help feature choice selected.
3. Select the Access to Internet-Based Help Features feature choice to allow access to Web sites from Applications Help. For example, some help files link to guides on the Oracle Help Center; this access is necessary for those links to work.
4. Select other feature choices as needed, and click Done.
5. Open the Set Help Options task.
6. In the Web Sites Available from Help Site section, select the sites to link to from the Navigator menu in Applications Help.
7. Save your work.

Setting Up Help Customization: Procedure

Users with the appropriate roles can customize predefined help or add their own files to help. To enable and set up help customization, do the following steps in the Setup and Maintenance work area, in the specified order.

Selecting Feature Choices

Perform these steps:

1. On the Features page for your offering, leave the Local Installation of Help feature choice selected.
2. Select the Help Customization feature choice.
3. Select the Custom Help Security feature choice if you want certain help files to be available only to a restricted set of users.

⚠️ Caution: Don’t select this feature choice if you don’t have this requirement, because the feature can affect performance.

4. Save your work.

Setting Help Options

Perform these steps:

1. Open the Set Help Options task in the Setup and Maintenance work area.
2. Optionally set options in these sections:
   
   - **Help Site Customization:**
     - Determine how users can identify custom files in Applications Help.
     - Upload your own image to use as the background picture on the help home page. Select an image that’s white along the entire left border, like you see in the default image.

   - **Oracle User Productivity Kit:** Add a link in the Navigator in Applications Help to your custom User Productivity Kit library.

   - **Privacy Statement:** Add a link to your own privacy statement. To see this link, users click their user name in the global area of Applications Help.

3. Save your work.

**Providing Users Access to Help Customization**

Only users with job roles containing the ATK-customize_help_topics_priv privilege can customize help. The Assign Help Text Administration Duty task is a reminder for you to follow up with your security administrator. Make sure that users who want to customize help have the access to do so.

**Setting Up Help File Security**

If you selected the Custom Help Security feature choice, then go to the Manage Help Security Groups task and select job roles to include in help security groups.

When you later customize a help file, you can select a group to determine which job roles have access to the file.

**FAQs for Set Help Options**

**Why can't I see certain sections on the Set Help Options page?**

What’s available on the page depends on the help feature choices that you select in the Setup and Maintenance work area. This table describes the correlation between feature choices and specific sections on the Set Help Options page.

<table>
<thead>
<tr>
<th>Help Feature Choice</th>
<th>Section on Set Help Options Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local Installation of Help</td>
<td>None, but without selecting this feature choice, you can’t select the other help feature choices</td>
</tr>
<tr>
<td>Access to Internet-Based Help Features</td>
<td>Web Sites Available from Help Site</td>
</tr>
<tr>
<td>Help Customization</td>
<td>Help Site Customization</td>
</tr>
<tr>
<td></td>
<td>Oracle User Productivity Kit</td>
</tr>
<tr>
<td></td>
<td>Privacy Statement</td>
</tr>
<tr>
<td>Custom Help Security</td>
<td>None</td>
</tr>
</tbody>
</table>

**When do I link to the Oracle User Productivity Kit library from Applications Help?**

If you license Oracle User Productivity Kit and have custom User Productivity Kit content to share with your users. Topics that you add as custom help files in Applications Help are available only in the See It mode. However, in the library, users
can see the same topic in other modes. If you have User Productivity Kit versions earlier than 3.6.1, then you can’t add User Productivity Kit topics as custom help. So the link to the library is the only way users can get custom User Productivity Kit content from Applications Help.

**What’s the URL for my Oracle User Productivity Kit library?**
The full path from the Web server where you’re hosting your Oracle User Productivity Kit content to the `index.html` file that opens the table of contents for the library. For example, `http://<your domain>.com/MyContent/PlayerPackage/index.html`.

In this example, you or your administrator published one player package that contains all the content to be linked to from Applications Help, including the `index.html` file, and placed the PlayerPackage folder in a folder called MyContent on the Web server.

**FAQs for Assign Help Text Administration Duty**

**Who can add and manage custom help?**
Users with the Customize Help Topics (ATK_CUSTOMIZE_HELP_TOPICS_PRIV) privilege can customize:

- Help in Applications Help and help windows
- Pages in the Getting Started work area

This privilege is assigned by default to the administrators for product families. Your security administrator can define which users have job roles with this privilege.

**Manage Help Security Groups**

**Creating Help Security Groups: Worked Example**
This example shows how to create a help security group, which contains a set of job roles. You can later assign the help security group to particular help files so that only users with any of the included job roles have access to the help.

The following table summarizes key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>What type of users do you need to limit help access to?</td>
<td>Human resources (HR) specialists</td>
</tr>
<tr>
<td>Is there a specific time period for which this access is needed?</td>
<td>No, the help files should always be viewed only by the HR specialists</td>
</tr>
<tr>
<td>Where do you want this group to appear in the list of values for help security groups?</td>
<td>First</td>
</tr>
</tbody>
</table>

Define a help security group and assign a job role to the group.
Prerequisites

1. Open the Features page for your offerings in the Setup and Maintenance work area.
2. Make sure that the Location Installation of Help feature choice is selected.

Creating the Help Security Group

1. In the Setup and Maintenance work area, go to the Manage Help Security Groups task.
3. Complete the fields, as shown in this table. Leave the start and end dates blank.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help Security Group</td>
<td>HR</td>
</tr>
<tr>
<td>Meaning</td>
<td>HR Only</td>
</tr>
<tr>
<td>Description</td>
<td>Viewing by HR specialists only</td>
</tr>
<tr>
<td>Display Sequence</td>
<td>1</td>
</tr>
</tbody>
</table>

4. Click **Save**.
5. With your new help security group selected, go to the Associated Roles section and add a new row.
6. Select **PER_HUMAN_RESOURCE_SPECIALIST** as the role name.
7. Click **Save and Close**.
   To assign your new help security group to help files, you must create or edit help using the Manage Custom Help page, not help windows.

Related Topics

- How can I restrict access to specific help files?
Understanding Analytics and Reports

Sales Cloud Analytics and Reports: Overview

Oracle Sales Cloud features a wealth of business intelligence (BI) analytics and reports that help sales personnel continuously monitor and interpret their sales pipeline, team performance, forecasts, activities, customers, and more. Users can find the analytics and reports throughout the applications. In addition, they can schedule reports and create briefing books with report data. On the go, Oracle Mobilytics provides quick access to reports on the Apple iPad, and integration with Oracle Sales Cloud Mobile gives personnel analytics and reports on mobile devices and tablets.

Access to Analytics Areas

In Sales Cloud, analytics are provided in various areas, including:

- Infolets pages available from the springboard
- Sales dashboard
- Business intelligence (BI) catalog

Infolets

Infolets are mini-portals with key metrics customized for the sales roles in the organization. Clicking on an infolet drills down to more detail on that report. Users navigate to infolets from the welcome springboard using the page controls located just below the search field.
The following figure shows the sales infolet page with key sales representative reports.

**Sales Dashboard**

The Sales dashboard gives sales personnel instant access to the information that keeps them productive in their daily tasks. By default, different views of the dashboard are available for:

- Sales representatives
- Sales managers
- Sales vice presidents
- Partner channel account managers

Depending on your implementation, users may have access to the Sales dashboard in the desktop UI. This dashboard also contains reports and analytics, plus has additional content and capabilities.

**BI Catalog**

The BI catalog stores all analytics, reports, and other BI objects, as well as tens of thousands of subject areas used to create custom reports. Managers and administrators are the typical users of the BI catalog. These users can access the BI catalog by clicking Reports and Analytics in the Navigator.
The following figure shows an example of the BI catalog.

![BI Catalog Example](image)

**Briefing Books**

A briefing book is a collection of BI analyses or dashboard pages (which can contain reports) that you create and save for later access. The static snapshots give you a picture of what’s going on at the time that the analysis or dashboard page is added to the briefing book. You can download briefing books as PDF or MHTML for viewing or printing, and share them with others. The PDF file includes a table of contents for the book. Like analytics and reports, briefing books are stored in the BI catalog.

**Scheduling Analytics and Reports**

You can submit reports as scheduled processes, and you can set up agents to e-mail analytics, briefing books, and dashboards.

**Sales Cloud Mobile**

Using Oracle Sales Cloud Mobile, sales personnel can access analytics and reports from the home page of a mobile device. Analytics also are embedded contextually for accounts. The contextual reports include data on sales account revenue trends, sales account win/loss trends, and sales account win/loss reasons.
Mobilytics

Oracle Mobilytics provides sales managers with sales analytics and reports using interactive graphics on an Apple iPad. For example:

- Perform "what if" analyses by moving opportunities between quarters, and achieve your quota with Forecast Shaper.
- Analyze sales stages to move large or important deals along and improve conversion rates with Pipeline Analyzer.
- Track the deals by team’s activities and focus on the right deals with Deals Radar.
- Manage the team’s performance by tracking their quota versus attainment with Team Tracker.
- Keep the forecast on track by analyzing pipeline and honing stale deals with Aging Monitor.

The following figure shows an example of the Forecast Shaper UI for Mobilytics.

Additional BI Resources

To find more information about Oracle Business Intelligence, consult the online help and refer to the Oracle Sales Cloud Creating and Administering Analytics guides.
Customizing Sales Cloud Analytics and Reports: Overview

Oracle Sales Cloud comes predefined with a wealth of business intelligence (BI) analytics and reports that help your sales team monitor and interpret your sales pipeline, team performance, forecasts, activities, customers, and more. If the supplied analytics and reports don’t meet your unique business requirements, you can build your own.

This topic provides an overview of customizing analytics and reports. For detailed information, see the online help and the Oracle Sales Cloud Creating and Administering Analytics guide.

Build Custom Analytics and Reports

You use the BI presentation catalog to build and view custom analytics and reports. You can browse the subject areas, which are organized by functional area, such as opportunities, leads, and the like. You can also create custom subject areas. Within each subject area are columns and attributes that you use to create the reports. Each report can have its own layout and format, such as table format or graph format. You can also filter attributes by various criteria.

You access the BI presentation catalog from the Navigator. Click Reports and Analytics in the navigator Tools menu.

Customizing Infolets

The Sales dashboard in the simplified UI comes predefined with several infolets, which are configurable portals that provide report summaries based on transactional sales data. Administrators can create custom infolets and display them in the Sales area of the simplified UI.

Related Topics
- Oracle Help Center
20 Understanding Audit Policies

Managing Audit Policies: Explained

Auditing is used to monitor user activity and all configuration, security, and data changes that have been made to an application. Auditing involves recording and retrieving information pertaining to the creation, modification, and removal of business objects. All actions performed on the business objects and the modified values are also recorded. The audit information is stored without any intervention of the user or any explicit user action.

Use audit policies to select specific business objects and attributes to be audited. The decision to create policies usually depends on the type of information to be audited and to the level of detail required for reporting.

Enabling Audit Functionality

For Oracle Applications Cloud, you must configure the business objects and select the attributes before enabling audit. If you enable audit without configuring the business objects, auditing remains inactive. By default, auditing is disabled for all applications. To enable and manage audit, ensure that you have a role with the assigned privilege Manage Audit Policies (FND_MANAGE_AUDIT_POLICIES_PRIV). For appropriate assignment of roles and privileges, check with your security administrator.

To enable auditing for Oracle Fusion Middleware products, select one of the levels at which auditing is required for that product. The audit levels are predefined and contain the metadata and events to be audited. For more information, see Audit Events for Oracle Applications Cloud Middleware (Doc ID 2114143.1) on My Oracle Support at https://support.oracle.com.

If you don't want an application to be audited, you can stop the audit process by setting the Audit Level option to None.

Related Topics

- Audit Events for Oracle Applications Cloud Middleware

Audit History: Explained

Using audit history you can view changes to the application data such as the business objects that were created, updated, and deleted. To view the history or to create a report, you must have a role with the assigned privilege View Audit History (FND_VIEW_AUDIT_HISTORY_PRIV). For appropriate assignment of roles and privileges, check with your security administrator.

To open the Audit History work area, from the Navigator menu, select Audit Reports.

The default search displays a summary of the audit history in the search results table. It includes key data such as date, user, event type, business object type, and description. For a detailed report, search again with modified search criteria. You can export the report summary to Microsoft Excel.
The following table lists the search parameters used and the outcome of their selection in the detailed report.

<table>
<thead>
<tr>
<th>Search Parameter</th>
<th>Result of Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Object Type</td>
<td>• Narrows the search results to that specific business object within the selected product.</td>
</tr>
<tr>
<td></td>
<td>• Enables the Show Attribute Details check box.</td>
</tr>
<tr>
<td><strong>Note:</strong> This parameter is applicable only for the business objects that belong to Oracle Applications Cloud.</td>
<td></td>
</tr>
<tr>
<td>Include Child Objects</td>
<td>Displays all the child objects that were listed under the business object when audit was set up. For example, a sales order object that contains several items as child objects.</td>
</tr>
<tr>
<td><strong>Note:</strong> Displays the objects at the immediate parent-child level only. To view the children at subsequent levels, select the child object as the business object type and search again.</td>
<td></td>
</tr>
<tr>
<td>Show Attribute Details</td>
<td>Enables the attribute list so that users can select either all attributes or a specific attribute to view the changes. Based on the selection, the search results indicate whether the attribute is created, updated or deleted, and the corresponding old and replaced values.</td>
</tr>
<tr>
<td>Show Extended Object Identifier</td>
<td>Displays the instances (contexts) in which the business object was used. The context values identify the objects and the transactions in which they were used. Each context is unique and assigns a unique description to the business object.</td>
</tr>
<tr>
<td><strong>Note:</strong> The default report displays a standard set of columns that contain prominent details of the audit history. To view additional details, you can customize the display of columns.</td>
<td></td>
</tr>
</tbody>
</table>

**Related Topics**

- Audit Event Types: Explained

**What Oracle Sales Cloud objects can I enable to track their audit history?**

You use auditing to monitor user activity and all configuration, security, and data changes that have been made to an application. You can enable business objects to allow auditing, recording, and retrieving information about when the objects were created, modified, and removed.

The following table shows the business objects you can enable for auditing.

<table>
<thead>
<tr>
<th>Area</th>
<th>Parent Objects</th>
<th>Child Objects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account and Contact Management</td>
<td>Account (Account Profile)</td>
<td>• Sales Account Profile</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Sales Account Resource</td>
</tr>
<tr>
<td>Area</td>
<td>Parent Objects</td>
<td>Child Objects</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>-------------------------</td>
<td>-------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Sales Account Territory</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Address</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Address Purpose</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Phone</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ E-Mail</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Instant Messaging</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Web</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Classification Assignment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Additional Account Name</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Contact Preference</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Usage Assignment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Additional Identifier</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Source System References</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Relationship</td>
</tr>
<tr>
<td></td>
<td></td>
<td>▪ Customer Contact Profile</td>
</tr>
</tbody>
</table>

| Account and Contact Management | Contact (Person Profile) | • Sales Account Profile                                                      |
|                                |                         | ▪ Sales Account Resource                                                      |
|                                |                         | ▪ Address                                                                     |
|                                |                         | ▪ Address Purpose                                                             |
|                                |                         | ▪ Phone                                                                       |
|                                |                         | ▪ E-Mail                                                                      |
|                                |                         | ▪ Instant Messaging                                                            |
|                                |                         | ▪ Web                                                                         |
|                                |                         | ▪ Classification Assignment                                                   |
|                                |                         | ▪ Additional Contact Name                                                     |
|                                |                         | ▪ Contact Preference                                                          |
|                                |                         | ▪ Usage Assignment                                                            |
|                                |                         | ▪ Additional Identifier                                                       |
|                                |                         | ▪ Source System References                                                    |
|                                |                         | ▪ Relationship                                                                |
|                                |                         | ▪ Customer Contact Profile                                                    |

<p>| Account and Contact Management | Household (Household Profile) | • Sales Account Profile                                                      |
|                                |                              | ▪ Sales Account Resource                                                      |
|                                |                              | ▪ Address                                                                     |
|                                |                              | ▪ Address Purpose                                                             |
|                                |                              | ▪ Phone                                                                       |
|                                |                              | ▪ E-Mail                                                                      |
|                                |                              | ▪ Instant Messaging                                                            |
|                                |                              | ▪ Web                                                                         |
|                                |                              | ▪ Classification Assignment                                                   |
|                                |                              | ▪ Additional Household Name                                                  |
|                                |                              | ▪ Contact Preference                                                          |
|                                |                              | ▪ Usage Assignment                                                            |
|                                |                              | ▪ Additional Identifier                                                       |</p>
<table>
<thead>
<tr>
<th>Area</th>
<th>Parent Objects</th>
<th>Child Objects</th>
</tr>
</thead>
</table>
| **Account and Contact Management**           | Resource (Resource Profile)            | • Source System References  
• Relationship  
• Address  
  • Address Purpose  
  • Location SDO  
• Phone  
• E-Mail  
• Instant Messaging  
• Web Page  
• Resource Organization Membership  
• Resource Role Assignment  
• Sales Representative Setup |
| **Common Components**                        | Activity                                | • Contacts  
• Resources |
| **Contracts**                                | Contract Header                        | • Buy Contract Line  
• Project Contract Line  
• Sales Contract Line  
• Service Contract Line |
| **Opportunities**                            | Opportunity                             | • Opportunity Revenue  
• Opportunity Split Revenue  
• Opportunity Recurring Revenue  
• Opportunity Revenue Line Set  
• Opportunity Team Member  
• Opportunity Partner |
| **Marketing**                                | Leads                                  | • Leads Product  
• Leads Resources  
• Leads Contacts  
• Leads Territories |
| **Marketing**                                | Budget                                 | • Budget Entries  
• Fund Requests |
| **Partner Relationship Management (PRM)**    | Partner                                | • Classification Assignment  
• Partner Type  
• Customer Contact Profile  
• Partner Certification  
• Expertise  
• Geographies Served  
• Industries Served  
• Product Specialties  
• Account Team  
• Address  
• Phone  
• Web  
• E-Mail  
• Instant Messaging |
| **Partner Relationship Management**          | Partner Program                        | • Program Benefit Details  
• Program Objective Details |
### Implementation Concepts for Audit Policies

#### Configuring Audit Business Object Attributes: Points to Consider

Audit enables tracking the change history of particular attributes of a business object. However, those objects and their attributes must be selected for audit and auditing must be enabled for that application. Your configuration settings determine which attributes to audit for a given object, and when the audit starts and ends. Auditing takes into account all the operations performed on an object and its attributes, such as create, update, and delete. To configure audit business object attributes, navigate to the Manage Audit Policies page in the Setup and Maintenance work area.

#### Selecting an Application

To set up auditing, you must select a web application that contains the required business objects that can be audited. From the list of business objects, select those business objects that you want to audit. Selecting a business object also displays its attributes that are enabled for auditing.

#### Selecting Attributes

For each selected business object to be audited, select the corresponding attributes to include in the audit. All attributes that belong to that object are by default selected for audit and appear on the user interface. However, you can add or remove attributes from the list. When you remove an attribute from the list, you stop auditing it even when the parent object is selected for audit. So, if you want an attribute to be audited, you must add it to the list. If the object selected in an audit hierarchy is also a part of several other audit hierarchies, the attribute configuration for that object is applicable to all the hierarchies in that application.

**Tip:** For business objects based on flexfields, select the Flexfields (Additional Attributes) check box to view and add or remove flexfield attributes, to include or exclude them from the audit.

#### Starting and Stopping Audit

The business object is ready for audit after you select its attributes and save the configuration changes. However, to start auditing, the audit level for Oracle Applications Cloud must be set to **Auditing** on the Manage Audit Policies page.

To stop auditing an object, you can deselect the entire object and save the configuration. As a result, all its selected attributes are automatically deselected and are not audited. To continue to audit the business object with select attributes, deselect those attributes that are not to be audited. When users view the audit history for an application, they can specify the period for which they want the results. Therefore, make a note of when you start and stop auditing an application.

For example, users intend to view the audit history of an object for the previous week, but auditing for that object was stopped last month. They wouldn’t get any audit results for that week, because during the entire month that object wasn’t

<table>
<thead>
<tr>
<th>Area</th>
<th>Parent Objects</th>
<th>Child Objects</th>
</tr>
</thead>
</table>
| Partner Relationship Management | Partner Enrollment | • Enrollment Participants  
|                             |                      | • Contract Enrollments                       |
| Territory Management        | Sales Territory Proposal | Sales Territory Proposal                      |
audited. Even if you enable audit for that object today, users can’t get the wanted results because audit data until today isn’t available.

Configuring Audit: Highlights

To set up auditing for Oracle Applications Cloud, use the Manage Audit Policies page in the Setup and Maintenance work area. To set up auditing for Oracle Fusion Middleware products, select the level of auditing mapped to a predefined set of metadata and the events that have to be audited. Information about configuring audit for Oracle Fusion Middleware products is provided in Oracle Fusion Middleware guides.

You can also create a configuration file and deploy it to audit a specific Oracle Fusion Middleware product. The configuration details for Oracle Fusion Middleware products are available as audit-specific assets that you can use to create the config.xml configuration file. To get a list of audit-specific assets, see Audit Events for Oracle Applications Cloud Middleware (Doc ID 2114143.1) on My Oracle Support at https://support.oracle.com.

Oracle Fusion Middleware Products

  
  See: Auditing Web Services

Oracle Fusion Security Products

- Configure business objects to enable auditing in Oracle Fusion security products. Refer to Oracle Fusion Middleware Application Security Guide.
  
  See: Oracle Fusion Middleware Audit Framework Reference

Related Topics

- Audit Events for Oracle Applications Cloud Middleware
21 Understanding Customization, Extensibility, and Integration

Sales Cloud Customization, Extensibility, and Integration: Overview

Oracle Sales Cloud offers several customization and extensibility options for its services, components, and modules. You can import and export data and integrate the service with other products and modules.

Customization, extensibility, and integration options include:

- Customize objects, user interfaces (UIs), and the Navigator menu.
- Customize online help.
- Access a rich set of subject areas around which to build customized reports.
- Configure reporting dashboards by adding new reports or changing the layout.
- Create custom copy maps to map fields or add information between copied business objects.
- Configure security components.
- Use web services to integrate and extend the services.
- Export data, modify it, and then import it back into the services.
- Integrate with other applications to extend the functionality.

For information on customizing online help, see the Oracle Sales Cloud - Customizing Sales guide.

Customizing Objects, UIs, and the Navigator

Use Application Composer to customize and extend Oracle Sales Cloud. For example, create a new object and related fields, then create new desktop pages where that object and its fields are exposed to users.

The following are some ways that you can customize objects, the UI, and the Navigator.

- Use Page Composer to edit the UI at run time. For example, show and hide regions, fields, and tables. Change the order of regions, or change a dashboard page layout.
- In the simplified UI, determine which icons to display across the top of the page (the area known as the springboard), as well as the welcome message or announcement.
- Add and remove links from the Navigator menu.
- Change the default text in the UI, for example, by replacing a term with another term throughout the applications.

For more information, see these guides:

- Oracle Sales Cloud - Customizing Sales
- Oracle Applications Cloud - Customizing the Applications for Functional Administrators
Customizing Reports and Dashboards
Oracle Sales Cloud comes predefined with reports that give you instant data about your customers, leads, opportunities, forecasts, and sales revenue. If the supplied reports do not meet all of your business needs, you can use Oracle Business Intelligence (BI) Composer to create your own reports against a rich variety of subject areas.

Both the desktop and simplified UIs feature reporting dashboards that you can customize, such as changing the layout and adding custom reports. For more information, see these guides:

- Oracle Sales Cloud Creating and Administering Analytics
- Oracle Sales Cloud Customizing Sales

Creating Custom Copy Maps
Copy maps are default mappings of fields between objects. For example, when you convert a lead to an opportunity, the application uses the copy map defined for the Lead and Opportunity objects to determine what to name the leads fields that are carried over to the newly created opportunity. Using Oracle Application Composer, you can create custom copy maps for several Sales Cloud business objects, thus allowing you to control the mapping.

Following are some use cases:

- Create custom maps to change the default mapping between fields when:
  - Leads and opportunities are copied from responses
  - Opportunities are created from leads
  - Opportunities are created from partner deal registrations
- Use Groovy scripting to include information about the lead on a new opportunity converted from a lead.

For more information, see the Oracle Sales Cloud Marketing Extensibility chapter in the Oracle Sales Cloud - Customizing Sales guide.

Extending Applications Using Web Services
You can use web services available to Oracle Sales Cloud to integrate with your external applications. Example extensions include:

- Integrate Oracle Sales Cloud with back-office applications
- Create customized Web-based portal applications that access Oracle Sales Cloud through a Web services interface.

For more information, see the article Oracle Fusion Sales Cloud Web Services (available on My Oracle Support, Doc ID 1354841.1).

Configuring Security Components
If the predefined security configuration doesn't meet your business needs, then you can make changes. For example, the predefined Sales Representative job role includes sales forecasting duties. If some business groups in your organization have the sales managers perform forecasting tasks instead of the sales representatives, then you can create a custom Sales Representative role without those duties. Alternatively, if a predefined job role is too narrowly defined, then you can create a job role with a greater range of duties than its predefined equivalent. See the Oracle Sales Cloud - Securing Oracle Sales Cloud guide for more information.
Exporting and Importing Data
You can import data into or export data out of Oracle Sales Cloud for various purposes. For example, you may want to:

- Export territory data, modify it offline, and reimport it.
- Import customers from a legacy system so you can use the object records in Oracle Sales Cloud.
- Move functional setup data from one instance into another.
- Create Microsoft Excel spreadsheets and load the data into the services.

See the following guides for more information:

- Oracle Applications Cloud - Using Functional Setup Manager
- Oracle Applications Cloud - Using Common Features

You can find an introduction to Bulk Export and File-Based Import and Export in the chapter, Import and Export, in this guide. Get more information on territory and quota export and import in this guide, in the Setting Up Territories and Understanding Sales Quotas chapters.

Integrating with Other Products
For additional functionality, you can integrate Oracle Sales Cloud with other products, including, Oracle E-Business Suite, JD Edwards EnterpriseOne, Siebel CRM, Oracle Marketing Cloud, and Oracle Configure, Price, and Quote (CPQ) Cloud. For more information on these integrations, see the article Oracle Sales Cloud Integration Documentation (available on My Oracle Support, Doc ID 1962226.1).

Related Topics
- My Oracle Support
- Understanding Default Navigation Components
- Defining Settings for Home and Navigation: Explained
- Oracle Help Center

Web Services
Oracle Sales Cloud Web Services: Explained
Oracle Sales Cloud comes with RESTful Web services and several categories of SOAP Web services that you can use to:

- Develop cloud applications that call on and integrate with Oracle Sales Cloud to deliver some of their functionality. You could sell these applications in the Oracle Cloud Marketplace. These applications might deliver other functionality independently or by integrating with third-party applications.
- Integrate suites of applications from third party vendors to Oracle Sales Cloud.
- Integrate different types of Oracle applications suites, such as Oracle E-Business Suite, with Oracle Sales Cloud.
• Customize and extend Oracle Sales Cloud applications to your business needs.

Oracle Sales Cloud Web Services provide you an alternative way of interacting with Oracle Sales Cloud applications. These Web services ensure that you are not limited by the UI. They enable you to quickly perform simple and complex one time and recurring operations.

Key Resources
For more information about using Web Services in Oracle Sales Cloud, see:

• Oracle Sales Cloud: Using RESTful Web Services (MOS Note ID: 1981941.1)
• Oracle Sales Cloud: Using Simplified SOAP Web Services (MOS Note ID: 1938666.1)
• Oracle Sales Cloud Web Services: (MOS Note ID: 1354841.1)
• Performing File-Based Data Import Using Web Services: (MOS Note ID: 1605219.1)

Oracle Sales Cloud RESTful Web Services: Explained
Oracle Sales Cloud includes the following RESTful Web services.
Oracle Sales Cloud RESTful services include child resources that let you manage the child objects such as addresses, relationships, and so on. Some of the child resources may in turn have other child resources. The child resources are documented in the parent resource.

<table>
<thead>
<tr>
<th>Resource Title</th>
<th>Resource Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Cloud Account</td>
<td>accounts</td>
</tr>
<tr>
<td>Sales Cloud Contact</td>
<td>contacts</td>
</tr>
<tr>
<td>Sales Cloud Household</td>
<td>households</td>
</tr>
<tr>
<td>Activity</td>
<td>activities</td>
</tr>
<tr>
<td>Resource</td>
<td>resources</td>
</tr>
<tr>
<td>Leads</td>
<td>leads</td>
</tr>
<tr>
<td>Opportunity</td>
<td>opportunities</td>
</tr>
</tbody>
</table>

For more information about using RESTful Web Services in Oracle Sales Cloud, see Oracle Sales Cloud: Using RESTful Web Services (MOS Note ID: 1981941.1).

Oracle Sales Cloud SOAP Web Services: Explained
Oracle Sales Cloud SOAP Web services includes the following:

• Simplified SOAP Web Services
Simplified SOAP Web Services

The new and simplified SOAP Web services are a subset of Oracle Sales Cloud Web Services. These Web services make it easy to integrate accounts, contacts, and households with other spoke systems. Simplified object structures represent logical views of accounts, contacts, and households. You don’t need to know the full data model to use the services correctly. Instead of calling multiple granular Web services to orchestrate a set of customer record updates, you can now perform the most common customer data management actions with new APIs. For example, you can use one API call to create account with locations and associate the account with existing contacts.

The following top-level SOAP services are available:

- Sales Cloud Account
- Sales Cloud Contact
- Sales Cloud Household

Use these services to create, edit, find, merge, and delete account, contact, and household objects. The services support commonly used profile attributes: one set of industry classification and parent node information attributes required to create an account hierarchy, address attributes, and one instance of different contact point type attributes such as phone, mobile, fax, and e-mail.

The following child services are also available and allow you to manage multiple addresses and relationships for the three top-level objects:

- Sales Cloud Address
- Sales Cloud Relationship

Steps to Enable

There are no steps necessary to enable these enhancements.

Tips and Considerations

- Attributes that are available on the simplified pages by default are available within each of the top-level services.
- The Sales Cloud Account service supports the management of an account hierarchy for a given account.
- The Sales Cloud Address service can be used only if there is more than one address related to the top-level object.
- The top-level services do not support any relationships. Use the Sales Cloud Relationship service to manage relationships between any two top-level objects.

For more information about using Simplified SOAP Web Services in Oracle Sales Cloud, see Oracle Sales Cloud: Using Simplified SOAP Web Services (MOS Note ID: 1938666.1).

Other SOAP Web Services

Overview

In addition to the Simplified SOAP Web services, Sales Cloud has an extensive list of other services using which you can perform complex operations. These Web services can be transactional data access services and migration services.

- Transactional data access services are services that provide access to the ADF Business objects and provide Create, Read, Update and Delete (CRUD) operations to these objects (for example, Opportunity Web service).
• Migration services are used primarily for moving data from various systems into Sales Cloud. They can be either private services used only internally or may be exposed publicly on a case-by-case basis (for example, Bulk Import Web service).

For more information about using Simplified SOAP Web Services in Oracle Sales Cloud, see Oracle Sales Cloud: Using Simplified SOAP Web Services (MOS Note ID: 1938666.1).

Import and Export Web Services: Explained

This topic explains the Web services that are available for implementing file-based data import and export.

Import Web Services

The following Web services are available for importing your custom data into Oracle Sales Cloud:

• File Import Activity Service ([ImportPublicService]): Service related to file-based import activity. This service enables submitting an import activity and monitoring its status.

• Metadata Public Service ([MetadataPublicService]): Service used to retrieve the object descriptions. This service provides the getObjectDefinitions method that retrieves the object descriptions.

For more information on using import Web services in Oracle Sales Cloud, see the topic Using Web Services for File-Based Data Import.

Export Web Service

You can use the Bulk Export Service V2 ([BulkExportService]) to export your custom data from Oracle Sales Cloud. This service is used to extract data in a batch process. You can use one of the following ways to use the service:

• Web Service proxy clients
• Business process execution language
• Connections architecture

For more information about using Bulk Export Service V2 ([BulkExportService]), see the topic Using Web Services for File-Based Data Export.

Related Topics

• Using Web Services for File-Based Data Export
• Using Web Services for File-Based Data Import
• Web Service Operations Supported by the Bulk Export Service: Explained
• Using Web Services Reference Information to Import Data

Cross-Origin Resource Sharing
CORS: Explained

Cross-Origin Resource Sharing (CORS) enables secure cross domain communication from a browser. You can configure CORS headers to enable a client application running in one domain to retrieve resources from another domain, using HTTP requests. By default, browser-based programming languages, such as JavaScript, can access content only from the same domain. CORS provides a mechanism to overcome this limitation and access resources from different domains.

To enable CORS in Oracle Applications Cloud, you must set profile option values for the CORS headers in the Setup and Maintenance work area. This table lists the supported CORS headers.

<table>
<thead>
<tr>
<th>CORS Header</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access-Control-Allow-Origin</td>
<td>Contains a comma-separated list of trusted origins that a client application can access resources from.</td>
</tr>
<tr>
<td>Access-Control-Max-Age</td>
<td>Specifies the duration of storing the results of a request in the preflight result cache.</td>
</tr>
<tr>
<td>Access-Control-Allow-Methods</td>
<td>Contains a comma-separated list of permitted HTTP methods in a request.</td>
</tr>
<tr>
<td>Access-Control-Allow-Headers</td>
<td>Contains a comma-separated list of permitted HTTP headers in a request.</td>
</tr>
<tr>
<td>Access-Control-Allow-Credentials</td>
<td>Specifies whether a client application can send user credentials with a request.</td>
</tr>
</tbody>
</table>

Example

A client application retrieves resource X from server A, which runs the application logic. The client application then makes an HTTP request to retrieve resource Y from server B. To allow this cross-server request from the client application, you must configure the **Access-Control-Allow-Origin** header in server A. Otherwise, the request fails and displays an error message.

Related Topics

- Setting Profile Option Values: Procedure

Managing Profile Option Values for CORS Headers: Points to Consider

You can set profile option values for the CORS headers using the Manage Administrator Profile Values task in the Setup and Maintenance work area.
CORS Headers
This table lists the CORS headers that you can set profile option values for.

<table>
<thead>
<tr>
<th>CORS Header</th>
<th>Profile Option Name (Profile Option Code)</th>
<th>Profile Option Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access-Control-Allow-Origin</td>
<td>Allowed Domains (ORACLE. ADF. VIEW. ALLOWEDORIGINS)</td>
<td>Valid values for allowed origins:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• URL of the specific origin, for example, <a href="http://www.mydomain.com">http://www.mydomain.com</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• * to allow access to resources from all origins</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Empty (no value set) to prevent access to resources from any origin</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You must set a value for this header to enable CORS.</td>
<td></td>
</tr>
<tr>
<td>Access-Control-Max-Age</td>
<td>CORS: Access-Control-Max-Age (CORS_ACCESS_CONTROL_MAX_AGE)</td>
<td>Default value for caching preflight request is 3600 seconds.</td>
</tr>
<tr>
<td>Access-Control-Allow-Methods</td>
<td>CORS: Access-Control-Allow-Methods (CORS_ACCESS_CONTROL_ALLOW_METHODS)</td>
<td>Default values for allowed methods are OPTIONS, HEAD, GET, POST, PUT, PATCH, DELETE.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> You must include Authorization, with a comma as the delimiter, to the list of allowed headers. For example: Accept, Accept-Encoding, Cache-Control, Authorization</td>
<td></td>
</tr>
<tr>
<td>Access-Control-Allow-Credentials</td>
<td>CORS: Access-Control-Allow-Credentials (CORS_ACCESS_CONTROL_ALLOW_CREDENTIALS)</td>
<td>• True to enable sending credentials with the request</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• False, which is the default value, to disable sending credentials with the request</td>
</tr>
</tbody>
</table>
Related Topics

- Setting Profile Option Values: Procedure
22 Understanding Import and Export

Understanding Import and Export: Overview

Bulk export and file-based import capabilities in Oracle Sales Cloud let you export and import much of your data for use in the applications. This chapter provides overviews of bulk export and file-based data import in Sales Cloud. For more information, see the related topics and the guides listed in the included topics.

Bulk Export: Overview

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

File-Based Data Import and Export: Overview

You can use file-based data import and export in Oracle Sales Cloud to import and export a wide range of application data. For example, you can use the file-based data export feature to export object data so that you can then import it into another Oracle Sales Cloud instance. And, for example, you can import records for Sales Cloud objects into the applications so that you don't have to create the records in the UI.
Most of the Sales Cloud business objects are import and export candidates, including:

- Accounts
- Addresses
- Appointments
- Classification codes
- Click-to-dial agents
- Consumers
- Contacts
- Contracts
- Country structures
- Customer hierarchies
- Employee resources
- Geographies
- Households
- Legal entities
- Marketing campaigns and responses
- Leads
- Notes
- Opportunities
- Partners
- Promotions
- Product groups
- Quotas
- Source system references
- Territories
- Tasks
- Users

Note that you can also import attachments for several Sales Cloud objects. For more information, see the Oracle Sales Cloud - Understanding File-Based Data Import and Export guide.

Related Topics

- Oracle Sales Cloud - Understanding File-Based Data Import and Export guide
Glossary

action
The kind of access, such as view or edit, named in a security policy.

application module
An application module is the transactional component that UI clients use to work with application data. It defines an updatable data model and top-level procedures and functions (called service methods) for a logical unit of work related to an end-user task.

autosuggest
Suggestions that automatically appear for a search field, even before you finish typing your search term. You can select any of the suggestions to run your search.

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.

briefing book
A collection of static or updatable analyses or dashboard pages that you can download, print, and share with others.

business function
A business process or an activity that can be performed by people working within a business unit. Describes how a business unit is used.

business intelligence catalog
The repository where all business intelligence objects, including analytics, reports, briefing books, and agents, are stored. The catalog contains separate folders for personal, shared, and custom objects.

business object
A resource in an enterprise database, such as an invoice or purchase order.

business unit
A unit of an enterprise that performs one or many business functions that can be rolled up in a management hierarchy.
candidate object
A candidate object is a business object, such as a resource or a territory, that is associated with one or more work objects for eventual assignment. Creating a candidate object involves entering its application information and selecting its attributes to use in rules or mappings.

CORS
Acronym for Cross-Origin Resource Sharing. A web service standard to enable a client application running in one domain to retrieve resources from another domain, using HTTP requests.

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.

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

dashboard
A page that provides quick access to key tasks and summary information for various objects within a functional area of interest.

data security
The control of access and action a user can take against which data.

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

descriptive flexfield
Customizable expansion space, such as fields used to capture additional descriptive information or attributes about an entity, such as a customer case. You may configure information collection and storage based on the context.

dimension
A data category used to define territory boundaries, such as geography. Dimensions contain related dimension members usually organized in hierarchies. For example, a geography dimension often includes members, such as countries, and cities that belong to countries. Defined dimensions determine how to assign objects, such as customers, leads, and opportunities.

DMZ
Acronym for demilitarized zone. An isolated internal network used for servers that are accessed by external clients on the Internet, such as web servers, to provide a measure of security for internal networks behind the firewall.

do not contact
A marketing response form that can be inserted into an e-mail. E-mail recipients can click the link to remove themselves from the subscription list associated with a marketing treatment.
e-mail bounce
An e-mail that is returned due to a temporary or permanent error condition.

extensible flexfield
Customizable expansion space used to capture multiple sets of information within a context or multiple contexts. Some extensible flexfields let you group contexts into categories.

external system or external application
A system or application that is external to and not part of Order Management. An order capture system that resides upstream of Order Management is an example of an external system. A fulfillment application that resides downstream of Order Management is an example of an external application.

feature choice
A selection you make when configuring offerings that modifies a setup task list, or a setup page, or both.

flexfield
A flexible data field that you can customize to contain one or more segments or store additional information. Each segment has a value and a meaning.

flexfield segment
An extensible data field that represents an attribute and captures a value corresponding to a predefined, single extension column in the database. A segment appears globally or based on a context of other captured information.

global area
The region at the very top of the user interface that remains the same no matter which page you’re on.

global search
The search in the global area that lets you search across many business objects.

HTTP
Acronym for Hypertext Transfer Protocol. A request and response standard typical of client-server computing. In HTTP, web browsers or spiders act as clients, while an application running on the computer hosting the web site acts as a server. The client, which submits HTTP requests, is also referred to as the user agent. The responding server, which stores or creates resources such as HTML files and images, may be called the origin server. In between the user agent and origin server may be several intermediaries, such as proxies, gateways, and tunnels.

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.

interface table
A database table that stores data during data transfer between applications or from an external system or data file.
job role
A role, such as an accounts payable manager or application implementation consultant, that usually identifies and aggregates the duties or responsibilities that make up the job.

key flexfield
Configurable flexfield comprising multiple parts or segments, each of which has a meaning either individually or in combination with other segments. Examples of key flexfields are part numbers, asset category, and accounts in the chart of accounts.

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.

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

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

mainline metadata
The primary branch of metadata that a sandbox is published to. Once published, changes made in the sandbox become available to all users.

marketing activity
An instance of the execution of a campaign stage, such as delivering a specific treatment to a specific audience.

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.

mini campaign
A simplified single stage communication platform that allows a marketer to interact with customers by e-mail or SMS.

MTA
Acronym for mail transfer agent. A software program that transfers electronic mail messages from one computer to another.

multistage campaign
An integrated multichannel communication platform that allows a marketer to achieve a specific marketing goal or objective through customer interaction, strategic advertisements, and lead generation.
OWLCS
Abbreviation for Oracle WebLogic Communication Services. Offers the TPCC service to Oracle Sales Cloud and sets up the calls using SIP integration with the telephony network.

primary ledger
Main record-keeping ledger.

privilege
A grant of access to functions and data; a single, real world action on a single business object.

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

profile option value
The setting mapped to the level of a profile option. A profile option may have multiple values set at different levels, such as Site or User.

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.

PSTN
Abbreviation for public switched telephone network which is the network of the world’s public circuit-switched telephone networks.

Query By Example
The row of fields directly above table column headers, used for filtering the data in the table.

reference data
Data in application tables that is not transactional or high-volume, which an enterprise can share across multiple organizations. For example, sales methods, transaction types, or payment terms.

reference data set
Contains reference data that can be shared across a number of business units or other determinant types. A set supports common administration of that reference data.

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

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

**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 promotion**
A business object used to offer special pricing, such as a percentage discount, free shipping, or a coupon.

**setup user**
A user provisioned with the job roles and abstract roles required to perform implementation tasks.

**simplified page**
A page that’s optimized for performing quick and frequent tasks on any device.

**simplified user interface**
A user interface that’s optimized for performing quick and frequent tasks on any device.

**SMTP**
Acronym for simple mail transfer protocol. A standard protocol used for sending e-mail across the Internet.

**SOAP**
Acronym for simple object access protocol. A protocol specification that relies on extensible markup language, for exchanging structured information in the implementation of web services within computer networks.

**springboard**
The grid of icons on the home page or the strip of icons above all simplified pages. Use the icons to open pages.

**stage**
A unit of the marketing campaign design that contains a single purpose that contributes to the overall objective of the campaign. The stage purpose can be for interacting, events, advertising, and generating leads.

**subscribe to list**
A marketing response form that can be inserted into an e-mail. E-mail recipients can click the link to add themselves to the subscription list associated with a marketing treatment.
suggestion group
Category of suggestions that appear in the autosuggest for the global search.

territory
The jurisdiction of responsibility of a salesperson or sales manager over a set of customers. Territories serve as a basis for forecasting, quota, compensation, and analysis of sales performance.

treatment
A marketing term that represents a combination of a marketing message for targeted audience members and delivery options for third-party suppliers.

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.

work area
A set of pages containing the tasks, searches, and other content you need to accomplish a business goal.

work object
A work object is a business object that requires assignment, such as a lead or an opportunity. Creating a work object involves entering its application information, selecting its attributes to use during assignment, and associating one or more candidates.

workflow
An automated process that passes a task from one user (or group of users) to another to view or act on. The task is routed in a logical sequence to achieve an end result.