Contents

Preface

1 About This Guide 1
   Audience and Scope 1
   Related Guides 1

2 Understanding Setup Tasks 5
   Performing Sales Setup Tasks 5
   System Requirements 5
   Understanding Implementation Structures 5
   Managing an Implementation 8
   Migrating Data Between Environments: Points to Consider 11

3 Using Profile Options, Lookups, and Scheduled Processes 13
   Profile Options, Lookups, and Scheduled Processes: Overview 13
   Profile Options 13
   Lookup Types 16
   Scheduled Processes 21

4 Setting Up Users and Security 25
   Defining Security: Overview 25
   Defining Setup Users: Overview 26
   Using Test E-Mail Accounts During User Setup 27
   About Sales Resources 28
   About the Sales Administrator 29
   Restricted Users 30
   Records Transfer Between Users 32
5 Setting Up Common Components

<table>
<thead>
<tr>
<th>Component</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setting Up Common Components: Overview</td>
<td>35</td>
</tr>
<tr>
<td>Activities</td>
<td>35</td>
</tr>
<tr>
<td>Application Toolkit</td>
<td>38</td>
</tr>
<tr>
<td>Approval Workflows</td>
<td>39</td>
</tr>
<tr>
<td>Attachments</td>
<td>40</td>
</tr>
<tr>
<td>Calendar</td>
<td>42</td>
</tr>
<tr>
<td>Click-To-Dial</td>
<td>45</td>
</tr>
<tr>
<td>Help</td>
<td>47</td>
</tr>
<tr>
<td>Lightbox</td>
<td>48</td>
</tr>
<tr>
<td>Messages</td>
<td>49</td>
</tr>
<tr>
<td>Navigation</td>
<td>51</td>
</tr>
<tr>
<td>Notes</td>
<td>54</td>
</tr>
<tr>
<td>Service Request Management</td>
<td>54</td>
</tr>
<tr>
<td>Watchlist</td>
<td>55</td>
</tr>
<tr>
<td>Miscellaneous Features</td>
<td>57</td>
</tr>
</tbody>
</table>

6 Setting Up Multiple Business Units

<table>
<thead>
<tr>
<th>Component</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Units: Overview</td>
<td>63</td>
</tr>
<tr>
<td>Multiple Business Units in Sales Cloud: Overview</td>
<td>63</td>
</tr>
<tr>
<td>Initial Tasks for Business Units</td>
<td>67</td>
</tr>
<tr>
<td>Sales Resources and Multiple Business Units</td>
<td>73</td>
</tr>
<tr>
<td>Multiple Business Units in Territories</td>
<td>76</td>
</tr>
<tr>
<td>Multiple Business Units in Leads</td>
<td>77</td>
</tr>
<tr>
<td>Multiple Business Units in Opportunities</td>
<td>83</td>
</tr>
<tr>
<td>Additional Implementation Concepts for Business Units</td>
<td>87</td>
</tr>
</tbody>
</table>

7 Setting Up Geographies and Territories

<table>
<thead>
<tr>
<th>Component</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Defining Geographies: Overview</td>
<td>95</td>
</tr>
<tr>
<td>Territory Management Features: Overview</td>
<td>95</td>
</tr>
<tr>
<td>Introduction to Territories</td>
<td>96</td>
</tr>
<tr>
<td>Implementation Concepts for Territories</td>
<td>104</td>
</tr>
<tr>
<td>Territory Dimensions</td>
<td>108</td>
</tr>
<tr>
<td>Territory Proposals</td>
<td>114</td>
</tr>
<tr>
<td>Territory Coverage</td>
<td>118</td>
</tr>
<tr>
<td>Territory Export and Import</td>
<td>130</td>
</tr>
<tr>
<td>Territory Navigation in the UI</td>
<td>138</td>
</tr>
</tbody>
</table>
8 Setting Up Work Assignment

- Work Assignment: Overview
- Implementation Concepts for Assignment
- Assignment Mappings
- Assignment Rules
- Custom Assignment
- Publishing Assignment Changes
- Account Assignment
- Opportunity Assignment
- Lead Assignment
- Partner Assignment
- Assignment Scheduled Processes
- Assignment Reports

9 Setting Up Multiple Currencies

- Setting Up Multiple Currencies: Overview
- Initial Tasks for Currencies
- Implementation Concepts for Currencies

10 Setting Up Search

- Setting Up Sales Cloud Search: Overview
- Work Area Search
- Global Search
- Global Search Automatic Suggestions

11 Setting Up Accounts and Contacts

- Customer Data Management: Overview
- Accounts and Contacts
- Customer Navigation Trees
- Integration with Third Parties

12 Setting Up Products

- Sales Products: Overview
- Initial Tasks for Sales Products
- Implementation Concepts for Sales Products
<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>13</td>
<td>Setting Up Sales Catalogs</td>
<td>Sales Catalogs: Overview</td>
<td>271</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Initial Tasks for Sales Catalogs</td>
<td>272</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Additional Implementation Concepts for Catalogs</td>
<td>280</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Catalog Maintenance</td>
<td>287</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Catalog Troubleshooting</td>
<td>288</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Working with Price Books: Procedures</td>
<td>292</td>
</tr>
<tr>
<td>15</td>
<td>Setting Up Promotions</td>
<td>Sales Promotions: Overview</td>
<td>295</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Working with Sales Promotions: Procedures</td>
<td>295</td>
</tr>
<tr>
<td>16</td>
<td>Setting Up Leads</td>
<td>Lead Management: Overview</td>
<td>299</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Implementation Concepts for Leads</td>
<td>299</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Lead Qualification Templates</td>
<td>310</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mass Update of Leads</td>
<td>313</td>
</tr>
<tr>
<td>17</td>
<td>Setting Up Opportunities</td>
<td>Opportunities: Overview</td>
<td>315</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sales Methods, Sales Stages, and Sales Coach</td>
<td>316</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sales Statuses</td>
<td>323</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Closing Opportunities</td>
<td>325</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Data Security</td>
<td>328</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Default Sales Channel</td>
<td>331</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Opportunity Search</td>
<td>332</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mass Update of Opportunities</td>
<td>334</td>
</tr>
<tr>
<td>18</td>
<td>Setting Up Opportunity Revenue</td>
<td>Setting Up Opportunity Revenue: Points to Consider</td>
<td>337</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Forecasted Revenue</td>
<td>338</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sales Credits</td>
<td>341</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Recurring Products</td>
<td>343</td>
</tr>
<tr>
<td>Chapter</td>
<td>Title</td>
<td>Pages</td>
<td></td>
</tr>
<tr>
<td>---------------</td>
<td>------------------------------</td>
<td>-------</td>
<td></td>
</tr>
<tr>
<td>19</td>
<td>Setting Up Competitors</td>
<td>347</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sales Competitors: Overview</td>
<td>347</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Managing Sales Competitors: Procedures</td>
<td>347</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Associating Competitors with Product Groups: Procedure</td>
<td>351</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enabling Competitors on Opportunity Product Lines</td>
<td>352</td>
<td></td>
</tr>
<tr>
<td>20</td>
<td>Setting Up Assessments</td>
<td>355</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assessments: Overview</td>
<td>355</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Initial Tasks for Assessments</td>
<td>355</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Implementation Concepts for Assessments</td>
<td>359</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Opportunity Assessments</td>
<td>364</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Lead Assessments</td>
<td>366</td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Setting Up Task Templates</td>
<td>369</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Task Templates: Explained</td>
<td>369</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Initial Tasks for Task Templates</td>
<td>369</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Implementation Concepts for Task Templates</td>
<td>371</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assessments Integration</td>
<td>372</td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Setting Up Forecasting</td>
<td>377</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sales Forecasting Features: Overview</td>
<td>377</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Initial Tasks for Forecasting</td>
<td>378</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Implementation Concepts for Forecasting</td>
<td>387</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Forecasting Processes</td>
<td>393</td>
<td></td>
</tr>
<tr>
<td>23</td>
<td>Setting Up Predictions</td>
<td>395</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sales Prediction: Overview</td>
<td>395</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Initial Tasks for Sales Predictions</td>
<td>395</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Implementation Concepts for Sales Predictions</td>
<td>398</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Model Rule Entities and Attributes</td>
<td>402</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Model Training</td>
<td>416</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Recommendations</td>
<td>417</td>
<td></td>
</tr>
</tbody>
</table>
24 Setting Up Quotas 421
- Sales Quota Management: Overview 421
- Quota Components 421
- Quota Administration 426
- Quota Assignment 432
- Quota Import References 439

25 Setting Up Partner Relationship Management 443
- Partner Relationship Management: Overview 443
- Channel Sales 445

26 Setting Up Social Networking 469
- Setting Up Social Networking: Overview 469
- Initial Tasks for Social Networking 469
- Partner Integration 470
- WebCenter Components 471
- Synchronizing Social Objects 471

27 Setting Up Mobile Applications 473
- Setting Up Mobile Applications: Overview 473
- CX Cloud Mobile 473
- Mobile Sales 488
- Mobilytics 501

28 Setting Up Outlook 505
- Overview of Oracle Sales Cloud for Outlook 505
- Initial Tasks for Outlook 505
- Implementation Concepts for Outlook 511

29 Setting Up Gmail 517
- Overview of Oracle Sales Cloud for Gmail 517
- Installing and Configuring Oracle Sales Cloud for Gmail: Explained 517
- Oracle Sales Cloud and Gmail Synchronization: Explained 518
- Scheduling Oracle Sales Cloud and Gmail Synchronization Job: Procedure 519
30 Understanding Analytics and Reports

Sales Cloud Analytics and Reports: Overview
Customizing Sales Cloud Analytics and Reports: Overview

31 Understanding Audit Policies

Managing Audit Policies: Explained
Audit History: Explained
What Oracle Sales Cloud objects can I enable to track their audit history?
Implementation Concepts for Audit Policies

32 Understanding Customization, Extensibility, and Integration

Sales Cloud Customization, Extensibility, and Integration: Overview
Web Services
Cross-Origin Resource Sharing

33 Understanding Import and Export

Understanding Import and Export: Overview
Bulk Export: Overview
File-Based Data Import and Export: Overview
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 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 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 Guides

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

You can find Sales Cloud guides on the Sales Cloud Help Center (docs.oracle.com/cloud/latest/salescs_gs/docs.htm). A full list of Oracle cloud guides are at docs.oracle.com/cloud/latest/allbooks.htm.

Sales Cloud Implementation Guides

The following table lists implementation guides.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>
</tr>
<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 needed to implement the contract management features of Oracle Sales Cloud.</td>
</tr>
</tbody>
</table>
## About This Guide

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud Implementing Incentive Compensation</td>
<td>Contains information on implementing sales compensation and payment plans.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Marketing</td>
<td>Contains conceptual information and procedures needed to implement the marketing components and features of Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Sales (This guide)</td>
<td>Contains conceptual information and procedures needed to implement components and features of Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Engagement Cloud Implementing Service Request Management</td>
<td>Contains conceptual information and procedures needed to implement the service request components and features of Oracle Engagement Cloud.</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>

You may also want to consult the Getting Started with Oracle Cloud guide.

### User Guides

The following table lists user guides.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud Using Campaigns</td>
<td>Contains information about creating and managing sales campaigns.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Customer Contracts</td>
<td>Contains information about creating and managing customer contracts.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Customer Data Management</td>
<td>Contains information about managing customer information and customer data quality.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Incentive Compensation</td>
<td>Contains information on administering and maintaining sales compensation and payment plans.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Leads</td>
<td>Contains information about creating and managing leads.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Sales</td>
<td>Aimed at salespeople, sales managers, and other sales users. Contains information about performing day-to-day tasks in Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Engagement Cloud Using Service Request Management</td>
<td>Contains information on creating service requests and managing service request queues.</td>
</tr>
</tbody>
</table>
## Analytics Guides
The following table lists analytics and reports guides.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud Creating and Administering Analytics</td>
<td>Contains information for administrators as they access and build analytics and make them available to sales personnel.</td>
</tr>
<tr>
<td>Oracle Cloud Administering Transactional Analyses</td>
<td>Describes implementation procedures for Oracle Transactional Business Intelligence, a real-time, self-service analysis and reporting solution offered to Oracle Fusion application users to create ad hoc analyses and analyze them for daily decision-making.</td>
</tr>
</tbody>
</table>

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

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

## Common Applications Guides
The following table lists Oracle cloud guides for common features.

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

Describes implementation and user concepts for Oracle Social Network.

Related Topics

- Oracle Help Center
2 Understanding Setup Tasks

Performing Sales Setup Tasks

For most Oracle Sales Cloud setup tasks, you'll 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.

For more information about 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

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
Understanding Implementation Structures

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.
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.

Functional Areas: Explained

A functional area is a grouping of functionality within an offering. It may be an optional piece of functionality that you may want to implement as part of an offering. Optional functional areas can be included or excluded from their parent offering. Functional areas may be hierarchical, and therefore may be subordinate to another functional area. An offering has at least one base or core functional area and may have one or more optional functional areas. Additionally, one or more or features may be associated to an offering. Base functional areas indicate the core functionality that you need to implement for the offering to be operational. Optional functional areas indicate optional functionality that you may or may not implement for an offering.

Common Functional Areas

Some core functionality essential to an offering such as setting the Initial Users or the Legal Structures may be shared across offerings. These are known as common functional areas and appear across offerings. Although most of the tasks associated to a common functional area are the same regardless of the offering you implement, there may be some offering-specific tasks.

In general once you implement a common functional area for a given offering, you won’t need to repeat its implementation for the remaining offerings, however, it’s recommended you check if there is any offering specific tasks that may still require your attention.

Base and Optional Functional Areas

Functional areas that support core functionality for an offering are known as base functional areas and must be implemented in order for the offering to be operational. Other functional areas known as optional functional areas support processes or functionality that can be implemented at your discretion depending on the business requirements. These can be implemented later during the implementation process.

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
3 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>
<tr>
<td>Allowed Task</td>
<td>User</td>
<td>Extensible</td>
<td>System</td>
</tr>
<tr>
<td>-------------------</td>
<td>------</td>
<td>------------</td>
<td>--------</td>
</tr>
<tr>
<td>Updating module</td>
<td>Yes</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

If a product depends on a lookup type, the customization level must be 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:

```
<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>
</tr>
</thead>
<tbody>
<tr>
<td>TASK_22APR_1</td>
<td>Code1_1</td>
<td>1</td>
<td>Y</td>
<td>11/12/2014</td>
<td>1/5/2015</td>
<td>TASK_22apr_1</td>
<td>Task_desc_1</td>
<td>Tag1_1</td>
</tr>
<tr>
<td>TASK_22APR_1</td>
<td>Code1_2</td>
<td>2</td>
<td>N</td>
<td>1/1/2014</td>
<td>1/11/2015</td>
<td>TASK_22apr_2</td>
<td>Task_desc_2</td>
<td>Tag1_2</td>
</tr>
<tr>
<td>TASK_22APR_2</td>
<td>Code2_1</td>
<td>3</td>
<td>N</td>
<td>11/12/2012</td>
<td>1/7/2015</td>
<td>TASK_22qpr_2_1</td>
<td>Task_desc_2</td>
<td>tag2_1</td>
</tr>
<tr>
<td>TASK_22APR_2</td>
<td>Code2_2</td>
<td>3</td>
<td>Y</td>
<td>11/12/2012</td>
<td>1/7/2015</td>
<td>TASK_22qpr_2_2</td>
<td>Task_desc_2</td>
<td>tag2_2</td>
</tr>
</tbody>
</table>
```

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.
- **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.
- **ReferenceGroupName**: Name of the reference group that contains the reference data set.

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

```
<table>
<thead>
<tr>
<th>LookupType</th>
<th>Meaning</th>
<th>Description</th>
<th>ModuleType</th>
<th>ModuleKey</th>
<th>ReferenceGroupName</th>
</tr>
</thead>
<tbody>
<tr>
<td>CODE_22APR_1</td>
<td>CODE_22apr_1</td>
<td>Code_desc_1</td>
<td>APPLICATION</td>
<td>FND</td>
<td>BU_APAC</td>
</tr>
<tr>
<td>CODE_22APR_2</td>
<td>CODE_22apr_2</td>
<td>Code_desc_2</td>
<td>APPLICATION</td>
<td>FND</td>
<td>BU_APAC</td>
</tr>
</tbody>
</table>
```

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.
Using Profile Options, Lookups, and Scheduled Processes

Chapter 3

Using Profile Options, Lookups, and Scheduled Processes

- **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>Tag2_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_2</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?
4 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.
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.

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### 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

## Restricted Users

### Sales Restricted Users: Explained

To do their jobs effectively, users must be able to view all the data that is relevant to their role. In some cases, however, users do not require the ability to create, update, or delete that data. You can create sales application users who have extensive privileges to view sales data, but limited privileges to change data, by provisioning users with the Sales Restricted User job role.

### Access Provided by the Sales Restricted User Job Role

Users assigned the Sales Restricted User job role can:

• View accounts, contacts, leads, and opportunities.
• Create and modify reports and analytics.
• Update, create, and manage service requests.
• Create, update, and delete notes, tasks and activities.
• Edit forecasts.
• Access content in Oracle Sales Lightbox.

Assigning the Sales Restricted User job role to the following types of users provides these users with the visibility into sales data that they require, without assigning them excess privileges.

• Back-office users can view reports, edit forecasts, and view activities and interactions.
• Service representatives can view all the information available for a customer and can see leads and opportunities.
• Seasonal or administrative users can view leads and opportunities.
For additional information about creating restricted sales users, see the topic, Creating Sales Restricted Users, in the Oracle Sales Cloud Implementing Sales guide, and the Oracle Sales Cloud Securing Oracle Sales Cloud guide, available on Oracle Help Center.

Related Topics
- Oracle Help Center

Creating Sales Restricted Users

You can create sales application users who have extensive privileges to view sales data, but limited privileges to create, update or delete that data, by assigning users the Sales Restricted User job role. For example, you might want to assign the Sales Restricted User job role to accounting or legal users, or to seasonal or administrative users.

Creating Sales Restricted Users

You create sales restricted users in the same way that you create sales application users. Oracle does not provide a resource role or role provisioning rule to automatically provision the Sales Restricted User job role to users, however, so you must first create both.

To create a sales restricted user:

1. Create a new resource role for the Sales Restricted User job role.
   For information about this task, see the topic Creating Additional Resource Roles. When creating the resource role, specify the values shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Name</td>
<td>Enter the name of the resource role as it will appear in the application UI, for example, Sales Restricted User.</td>
</tr>
<tr>
<td>Role Code</td>
<td>In the Role Code field, enter a unique internal name, for example, SALES_RESTRICTED_USER.</td>
</tr>
</tbody>
</table>

2. Create a role provisioning rule to automatically provision users with the roles required for restricted access.
   For information about this task, see the topic Creating Rules to Automatically Provision Job Roles to Sales Users.
   a. When creating the provisioning rule, specify the values shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Role</td>
<td>Sales Restricted User</td>
</tr>
<tr>
<td>HR Assignment Status</td>
<td>Active</td>
</tr>
</tbody>
</table>

   b. In the Associated Roles region, add the following roles and select the Autoprovision option for each:
      - Sales Restricted User job role
      - Resource abstract role
3. Create the user who is to have restricted access to the application.

For information about this task, see the topic Creating Sales Application Users.

a. When creating the user, specify the values shown in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person Type</td>
<td>Employee</td>
</tr>
<tr>
<td>Resource Role</td>
<td>Sales Restricted User</td>
</tr>
</tbody>
</table>

b. In the Roles region, click Autoprovision Roles.

The user is automatically assigned the following roles:

- Sales Restricted User job role
- Resource abstract role
- Employee abstract role

A predefined rule automatically assigns the Employee abstract role to all active users who are created as employees.

Related Topics
- Creating Additional Resource Roles: Worked Example
- Creating Rules to Automatically Provision Job Roles to Sales Users: Worked Example
- Creating Application Users for Oracle Sales Cloud

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.
5 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_TASKSEXTERNAL_NOTIFICATION).
- Appointment notifications are sent to contacts (ZMM_ACTIVITYEXTERNAL_NOTIFICATION).
- An iCal is sent with e-mail notifications of appointments (ZMM_ACTIVITYICAL_IN_NOTIFICATION).
- Appointment e-mail notification is disabled for the entire company (ZMM_ACTIVITYDISABLEEMAIL_APPT_NOTIF).
- Task e-mail notification is disabled for the entire company (ZMM_ACTIVITYDISABLEEMAIL_TASK_NOTIF).
- Task notification in the notification list is disabled for the entire company (ZMM_ACTIVITYDISABLELIST_TASK_NOTIF).
- Appointment notification in the notification list is disabled for the entire company (ZMM_ACTIVITYDISABLELIST_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_NOTIF_PAST</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_EMAIL_REMINDER</td>
<td>Whether to receive appointment e-mail reminders.</td>
</tr>
<tr>
<td>ZMM_ACTIVITY_NOTIFICATION_LIST_REMINDER</td>
<td>Whether to receive appointment reminders in the notification list.</td>
</tr>
<tr>
<td>ZMM_ACTIVITY_TASK_NOTIF_OWNER_INITIATED</td>
<td>Whether to receive task notifications when you make changes and you are the owner of the task.</td>
</tr>
</tbody>
</table>
Setting Up Common Components

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**

**Understanding Oracle Application Toolkit**

Oracle Application Toolkit provides many features that are available in many areas of the cloud service, including Oracle Applications Help, the Oracle Business Intelligence Reports and Analytics pane, and the Watchlist in the global area. In the
Setup and Maintenance work area, setup users access the Define Application Toolkit Configuration task list to set up some of these components and 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.

For more information, see the online help.

Related Topics
- Oracle Applications Help

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.
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.

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>
<tr>
<td>Oracle User Productivity Kit (UPK)</td>
<td>Enable the Link to User Productivity Kit library from help site check box if you have Oracle User Productivity Kit content in the help portal. Enter the URLs for the UPK content.</td>
</tr>
<tr>
<td>Privacy Statement</td>
<td>Enter the URL to your company’s privacy statement.</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?
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.

\[\text{Note:} \quad \text{Don't delete predefined messages unless you are sure that they aren't used anywhere.}\]

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.

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
Notes

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

Service Request Management

Setting Up Service Request Management: Overview

Using the Oracle Engagement Cloud service request functionality, sales and service representatives can create and manage service requests. Several tasks are involved in setting up the functionality, as summarized in this topic.
Summary of Features
Service request management lets sales and service professionals:

- Create service requests
- Enter summary information into service requests
- Add products and product groups to service requests
- Organize service requests into queues
- Compose and send messages from service requests
- Add contacts to service requests
- Add team members to service requests
- Automatically or manually assign service requests to other users
- Create activities for service requests
- Share service request information using a social network
- Associate and view items in the knowledge base
- Integrate with the partners application to capture and resolve issues reported by your partner accounts

See the Oracle Engagement Cloud Using Service Request Management guide for more information about sales user tasks for service requests.

Summary of Setup Tasks
The following are the high-level setup tasks for service request management:

- Enable the Service offering
- Understand the predefined service request job and duty roles
- Define service request assignment rules
- Enable the sales catalog for service requests
- Enable outbound e-mail messages for service requests
- Configure service request categories
- Configure knowledge base settings for service requests
- Customize service request lookups

See the Oracle Engagement Cloud Implementing Service Request Management guide for more information about service requests setup tasks.

Related Topics
- Oracle Engagement Cloud - Using Service Request Management guide
- Oracle Engagement Cloud - Implementing Service Request Management guide
- Setting Up the Service Offering: Overview

Watchlist
Chapter 5
Setting Up Common Components

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
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.
   - The allowed characters are: 0-9, A-Z, a-z, and the following special characters: period, hyphen, comma, and underscore.
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-0000000001, 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>4000000</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.</td>
</tr>
</tbody>
</table>
Related Topics

- Document Sequences: Explained
- Document Sequences: Points to Consider
Setting Up 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 Sales Cloud: Overview

Setting up your enterprise structure with multiple business units (BUs) lets you have separate units that can perform different business functions and that can be rolled up into the management hierarchy. In Oracle Sales Cloud, the following business objects support the use of multiple BUs:

- Contracts
• Leads
• Opportunities
• Resource Organizations
• Territories

Benefits of Using Multiple BUs
Before implementing a multiple-BU model, evaluate whether your implementation can benefit from implementing multiple BUs. This evaluation is, of course, specific to each organization, but some of the considerations include:

• Access customer data across BUs: Realize a complete, single view of your customers and their interactions across all BUs.

  Note: Access to master data, such as accounts and contacts, must be driven through territory-based assignment. Master data cannot be segregated by business unit.

• Global reporting and forecasting: Get enterprise-wide analytics for key stakeholders and executives. Forecasting and pipeline management can be done globally.
• Standardize business processes: Use best practices and standardize sales processes across the enterprise.
• Improve collaboration: Sales teams across BUs can collaborate on deals with the same customer, avoiding conflicts for similar products and improving cross-sell and upsell opportunities.
• Reduce integration costs and data duplication: Fewer integrations are needed between sales and ERP systems, with improved data quality in the sales system.
• Reduce duplicate development: Lower ownership costs for implementation and consulting resources. Avoid duplication of setups and custom development artifacts.
• Reduce subscription costs: Users supporting different BUs don’t need to sign on to multiple systems that require separate licenses.

Sales Cloud Benefits With Multiple BUs
Depending upon your business needs, structuring your enterprise with multiple BUs can be beneficial within the sales business objects that support multiple BUs. The following table lists some of the ways your Sales Cloud implementation can benefit from using multiple BUs.

<table>
<thead>
<tr>
<th>Business Object</th>
<th>Usage or Benefit</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contracts</td>
<td>• You can associate contracts with a BU, allowing them to be restricted by BU.</td>
<td>See the topics on setting up business units for the contract terms library in the Oracle Sales Cloud Implementing Enterprise Contracts guide.</td>
</tr>
<tr>
<td></td>
<td>• You can specify some Contract Terms Library components at the BU level. For example, you can enable clause and template adoption at the BU level.</td>
<td></td>
</tr>
</tbody>
</table>

| Leads           | • You can associate leads with a BU, allowing transactional data to be restricted by BU. | See the topics: |
|                 | • You can select which assignment rules and assessment templates to use for your leads. | • Multiple Business Units in Leads: Overview |
|                 | • You can use set-ID-enabled lookups to segregate lookup values by BU. | • Specifying Leads Business Unit Properties: Procedure |
### Business Object | Usage or Benefit | More Information
--- | --- | ---
**Opportunities** | • You can associate opportunities with a BU, allowing transactional data to be restricted by BU.  
• You can use set-ID-enabled lookups to segregate lookup values by BU. This type of configuration lets you present different lookup values to users in different BUs.  
• You can set profile options at the BU level, including the close opportunity required fields, default sales method, and territory assignment method.  
• You can associate several opportunity attributes with a set ID, allowing them to be shared across reference data sets. | See the topics:  
• Multiple Business Units in Opportunities: Overview  
• Specifying Opportunity Business Unit Properties: Procedure  
• Adding the Business Unit Field in Opportunities: Procedure

**Resource Organizations** | You can associate sales resources and resource organizations with a BU, thereby limiting the sets of data that the sales resources have access to. | See the topics:  
• Sales Resources and Multiple Business Units in Sales Cloud: Overview  
• Associating Resource Organizations With Multiple Business Units: Procedure

**Territories** | You can define the coverage of a sales territory by selecting a BU. Leads and opportunities identified with your defined BU are assigned to the territory. | See the topics:  
• Defining Territories Using Business Units: Explained  
• Territory Dimension Administration: Explained
The following figure helps illustrate the different data types, resource organizations, and resources.

**Multiple BUs Use Case**

The use case described here can help you understand the concepts associated with multiple BUs.

In the use case, Vision Enterprises is a global high-technology company with two divisions: Vision Corp., focused on software, and Vision Systems, selling high-end servers and engineered systems that combine hardware and software in a single stack. Both divisions operate globally across North America, Europe, and Asia Pacific regions, so they create BUs for each of these areas.

The following figure shows the use case. The diagram shows Vision Enterprises as encompassing its two divisions, Vision Corp. and Vision Systems. The diagram shows the two divisions, Vision Corp. and Vision Systems, as each encompassing three BUs: North America, Europe, and Asia Pacific.
Sales Administrator and Multiple BUs

By default, sales administrators have access to only the data available in the BU to which they are associated. However, there are few access paths, such as organization hierarchy and default business unit, through which an administrator could get access to opportunities outside her BU.

Initial Tasks for Business Units

Multiple Business Units High-Level Setup Steps

Several steps and considerations are required to set up multiple business units (BUs) in Oracle Sales Cloud. All of these steps and considerations may or may not be necessary, depending upon which product or business object you are enabling for multiple BU support.

The following are the high-level steps to set up multiple-BU functionality in Sales Cloud.

Note: For the purposes of the Sales Cloud multiple-BU setup, it’s assumed that your company’s basic enterprise structure, including a legal entity, legal division, and organizations, is already set up.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set Sales Cloud profile options to enable multiple BUs functionality</td>
<td>You must set two profile options to enable the multiple-BU functionality.</td>
<td>See the topic, Setting Sales Cloud Business Unit Profile Options: Procedure, for more information.</td>
</tr>
</tbody>
</table>
| Create additional BUs                          | Define additional business units in the Setup and Maintenance work area. If you have already done this as part of your enterprise setup, then you can skip this step. | • See the topics, Creating Business Units: Overview and Defining Business Units: Procedure  
  • The guide, Oracle Applications Cloud Understanding Enterprise Structures, available on the Oracle Help Center |
| Set business unit functions                     | A business function describes how a business unit is used. You must set business unit functions. If you have already done this as part of your business unit setup, then you can skip this step. | The topic, Setting Business Unit Functions: Procedure |
| Create set-enabled reference data               | If you are going to partition reference data by BU, you must create additional reference data sets for set-enabled attributes of objects. | See the topics:  
  • Managing Reference Data: Overview  
  • Creating Reference Data Sets: Procedure |
| Assign a default reference data set to business units | For each BU for which you want to partition data, assign it a default reference data set. | See the topic, Specifying Business Unit Set Assignments: Procedure |
### Setting Up Multiple Business Units

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
</table>
| Associate sales resources with BUs using resource organizations | While most sales resources are associated with a single BU, overlay teams might need to work with multiple BUs. Sales Cloud lets you associate sales team members with one or more BUs. | See the topics:  
  - Sales Resources and Multiple Business Units in Sales Cloud: Overview  
  - Associating Resource Organizations With Multiple Business Units: Procedure  
  - Multiple Business Units and Data Access, in the Securing Oracle Sales Cloud guide |
| Associate BUs with territories | If you want to assign sales team members within territories by BU, you can assign the Business Unit dimension to territories. | See the topics:  
  - Defining Territories Using Business Units: Explained  
  - Territory Dimension Administration: Explained |
| Enable leads and partners to use multiple BUs | You can specify lead attributes and some partner attributes at the BU level. Use Application Composer to enable the Business Unit field in the leads UI. | See the topics:  
  - Multiple Business Units in Leads: Overview  
  - Specifying Leads Business Unit Properties: Procedure  
  - Adding the Business Unit Field in Leads: Procedure |
| Enable opportunities to use multiple BUs | Specify opportunity attributes at the BU level. Use Application Composer to enable the Business Unit field in the opportunities UI. | See the topics:  
  - Multiple Business Units in Opportunities: Overview  
  - Specifying Opportunity Business Unit Properties: Procedure  
  - Adding the Business Unit Field in Opportunities: Procedure |
| Implement custom, BU-specific business processes and UI layouts | Use Oracle Application Composer to define and manage UI layouts, workflows, validations, and triggers for different BUs. | See the Oracle Sales Cloud Customizing Sales guide |

## Related Topics
- Multiple Business Units and Data Access: Explained

### Setting Sales Cloud Business Unit Profile Options: Procedure

To enable multiple business units (BUs) in Oracle Sales Cloud, you must set the two profile options discussed in this topic.
The two profile options are:

- Multiple Business Units Enabled (HZ_ENABLE_MULTIPLE_BU_CRM): Set this profile option to Yes. The default value is No.
- Customer Relationship Management Business Unit Default (HZ_DEFAULT_BU_CRM): Set this to the default Sales Cloud business unit.

Use the following procedure to set the profile options.

1. Sign in as a setup user and navigate to the Sales implementation project in the Setup and Maintenance work area.
2. Within the implementation project, click the Setup button.
3. Search for and select the task, Manage Common CRM Business Unit Profile Options.
4. Select the HZ_ENABLE_MULTIPLE_BU_CRM profile option and set it to Yes.
5. Click Save and Close.
6. Select the HZ_DEFAULT_BU_CRM profile option and set it to the default Sales Cloud business unit.
7. Click Save and Close.

Creating Business Units: Overview

A single business unit (BU) is created for you when you install your Oracle Sales Cloud service. You can define additional BUs as needed. If you have already done this as part of your enterprise setup, then you can skip this step.

The setup of business units is part of the enterprise structure setup. The following table shows the activities required to set up enterprise structures. For the purposes of the Sales Cloud multiple BU setup, it’s assumed that your company’s basic enterprise structure, including a legal entity, legal division, and organizations, is already set up.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Enterprise</td>
<td>Define the enterprise to get the name of the deploying enterprise and the location of the headquarters. This step is completed for you as part of your initial setup. See the Oracle Sales Cloud Getting Started With Your Implementation guide for more information.</td>
</tr>
<tr>
<td>Define Enterprise Structures</td>
<td>Define enterprise structures to represent an organization with one or more legal entities under common control. Define organizations to represent each area of business within the enterprise. <em><strong>SMEs: would this include setting up resource orgs</strong></em></td>
</tr>
<tr>
<td>Define Legal Jurisdictions and Authorities</td>
<td>Define information for governing bodies that operate within a jurisdiction.</td>
</tr>
<tr>
<td>Define Legal Entities</td>
<td>Define legal entities and legal reporting units for business activities handled by the Oracle cloud applications.</td>
</tr>
<tr>
<td>Define Business Units</td>
<td>Define business units of an enterprise to perform one or many business functions that can be rolled up in a management hierarchy.</td>
</tr>
</tbody>
</table>

Note: You can use the
### Step-by-Step Guide: Setting up Multiple Business Units

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Define Financial Reporting Structures</td>
<td>Define financial reporting structures, including organization structures, charts of accounts, organizational hierarchies, calendars, currencies and rates, ledgers, and document sequences used in organizing the financial data of a company.</td>
</tr>
<tr>
<td>Define Chart of Accounts</td>
<td>Define chart of accounts including hierarchies and values to enable tracking of financial transactions and reporting at legal entity, cost center, account, and other segment levels.</td>
</tr>
<tr>
<td>Define Ledgers</td>
<td>Define the primary accounting ledger and any secondary ledgers that provide an alternative accounting representation of the financial data. Some Sales Cloud implementations do not require recording accounting transactions, and therefore, do not require a ledger.</td>
</tr>
<tr>
<td>Define Accounting Configurations</td>
<td>Define the accounting configuration that serves as a framework for how financial records are maintained for an organization.</td>
</tr>
<tr>
<td>Define Facilities</td>
<td>Define your manufacturing and storage facilities as inventory organizations if your company tracks inventory balances there and item organizations if your company only tracks the items used in the facility but not the balances.</td>
</tr>
<tr>
<td>Define Reference Data Sharing</td>
<td>Define how reference data in the applications is partitioned and shared.</td>
</tr>
</tbody>
</table>

For detailed concepts about implementing the enterprise structure, read the guide, Oracle Applications Cloud Understanding Enterprise Structures, available on Oracle Help Center. The use case in the topic, Multiple Business Units in Sales Cloud: Overview, can help you with a sample structure.

For a procedure on how to create additional business units, see the topic, Defining Business Units: Procedure.

**Related Topics**
- Enterprise Structures Business Process Model: Explained
- Global Enterprise Configuration: Points to Consider
- Oracle Help Center - All Guides

## Defining Business Units: Procedure

You must define business units in the Setup and Maintenance work area. If you have already done this as part of your enterprise setup, then you can skip this step.

> **Note:** A single BU is created for you when you initially set up your cloud service. The profile option, HZ_ENABLE_MULTIPLE_BU_CRM, which enables multiple BU functionality in Oracle Sales Cloud, must be set to yes in order to be able to create additional BUs.

Use the following procedure to create additional business units.

1. Sign in as a setup user and navigate to the Sales implementation project in the Setup and Maintenance work area.
2. Within the implementation project, click the Setup button.
3. Search for and select the Manage Business Unit task. The Manage Business Units page appears.
4. Select the create icon, or select Create from the Actions menu.

The Create Business Unit page appears.

5. In the Name field, enter a name for the BU.

6. Optionally, enter the Manager and a Location.

7. Ensure that the Active check box is selected.

8. Pick a Default Set for the BU. This is the reference data set that the BU will use.

For more information on reference data sets, see the topics on reference data sets.

9. Click Save and Close.

Setting Business Unit Functions: Procedure

A business unit can perform many business functions. A business function represents a business process, or an activity that can be performed by people working within a business unit and describes how a business unit is used. You must set business unit functions in the Setup and Maintenance work area. If you have already done this as part of your business unit setup, then you can skip this step.

Use the following procedure to set business unit functions.

1. Sign in as a setup user and navigate to the Sales implementation project in the Setup and Maintenance work area.

2. Within the implementation project, click the Setup button.

3. In the Search Tasks box, enter business unit to retrieve a list of business-unit-related tasks.

4. In the list of tasks, the Assign Business Unit Business Function task row will have a Select Scope column that shows the business unit to be modified. If you want to change which business unit is being modified, click the link and select a different BU.

If, after selecting the Assign Business Unit Business Function task, a dialog window appears to select a functional area of either Organization Structures or Users and Security for the business function task, select the Organization Structures functional area and click Done.

5. The Assign Business Functions page appears. In the Business Unit Functions list, select the functions that apply to the business unit.

For more information about business unit functions, see the topic, Business Functions: Explained.

6. Click Save and Close.

7. If, after selecting the Assign Business Unit Business Function task, a Select Scope dialog window appears, showing two radio buttons, select the Assign Business Unit Business Function option.

   a. Select the drop-down arrow in the Business Unit field.

   b. Click the Select and Add option.

   c. Click Apply and Go to Task.

      The Select and Add: Business Unit page appears.

   d. Search for and select the BU to which you need to assign a function.

   e. Click Select and Add in the dialog window.

Related Topics

• Business Functions: Explained
Managing Reference Data: Overview

Reference data is data that is associated with transactional objects, such as leads and opportunities. Reference data is organized into reference data sets. The reference data model lets companies separate transactional data so that it can be used across business units (BUs) or only for specific BUs. A data set called the Common set is predefined with the application. You can use the Common set for reference data that you want to share across business units. You can also create and maintain custom sets and assign them to specific BUs.

Examples of reference data include lists of values, such as the Win/Loss Reason list of values in opportunities, opportunity sales methods lists, opportunity sales stages lists, and price lists.

All reference data is tagged with a configuration ID called Set ID. For example, every value in a list of values in an opportunity is tagged with a Set ID.

You can create separate sets and subsets for each business unit. Alternatively, you can create additional common sets or subsets to enable sharing reference data across several business units, without duplicating the reference data.

The following figure shows an example of reference data in the Common set and different reference data in a set called APAC. Users associated with the BUs assigned to the Common set can access the data associated with it, but they cannot access the data associated with the APAC BU unless they are part of the BUs assigned to that reference data.

You assign reference data sets to set-enabled attributes in the Manage Business Unit Set Assignment page in Setup and Maintenance. For a procedure on assigning data sets to set-enabled data, see the topic, Specifying Business Unit Set Assignments: Procedure.
Creating Reference Data Sets: Procedure

Reference data is organized into reference data sets. You create reference data sets in the Manage Reference Data Sets page in Setup and Maintenance.

Use the following procedure to create reference data sets. In a later step, you'll assign them to business units. If you have already created reference data sets, you can skip step.

1. Sign in as a setup user and navigate to the Sales implementation project in the Setup and Maintenance work area.
2. Within the implementation project, click the Setup button.
3. In the Search Tasks box, search for the Manage Reference Data Sets task.
4. Select the task.
   
   The Manage Reference Data Sets page appears.
5. Click the new icon, or select New from the actions menu.
   
   The Manage Reference Data Sets page appears.
6. Enter the appropriate data in the following fields:
   o Set Code: Enter a unique code.
   o Set Name: Enter the name of the set.
   o Description: Enter a description of the set.
7. Click Save and Close.

Specifying Business Unit Set Assignments: Procedure

If you are partitioning reference data so that different business units (BUs) can use different sets of data, you must assign a default set to each business unit. You may have already done this when setting up BUs. If that is the case, then you can skip this step. If you do specify set assignments in this manner, these settings override the setting in the business units edit page.

Use the following procedure to assign reference data sets to business units.

1. Sign in as a setup user and navigate to the Sales implementation project in the Setup and Maintenance work area.
2. Within the implementation project, click the Setup button.
3. To navigate to the Manage Business Unit Set Assignment page, use the Search Tasks box to search for and select the task, Manage Business Unit Set Assignment.
   
   If a dialog window appears to select a functional area of either Organization Structures or Users and Security for the business function task, select the Organization Structures functional area and click Done.
4. In the list of tasks, select the Manage Business Unit Set Assignment task.
   
   The Manage Set Assignments page appears.
5. For each reference data object, select the set that you want to assign to the business unit.
6. Click Save and Close.

Sales Resources and Multiple Business Units
Sales Resources and Multiple Business Units: Overview

You can map multiple business units (BUs) to your resource organizations in order to regulate sales users' visibility into transactional data. Transactional data is the data found in business objects such as opportunities, leads, and contracts.

Note: It is assumed you have already created a resource organization hierarchy according to the instructions in the Oracle Sales Cloud Getting Started with Your Implementation guide.

Sales User Access to Transactional Data

Sales users’ access to transactional data for an object is the same in multiple BU environments and single BU environments. That is, sales users can access object data across BU boundaries provided that they have valid access to the object by means of territory or team membership, through the resource hierarchy, or by being granted full access to the object. For example, a sales representative can have access to data as determined by team and territory membership, irrespective of the BUs she is associated with.

Business unit assignment can, however, indirectly affect a user's access to object transactional data. In a multiple BU environment, BUs are available as territory dimensions and can be included as part of the territory coverage definition for the assignment of transactions. A sales user gains access to object data through territory membership. If BU is specified as a territory dimension, then the user's access to data is limited to objects which, when they were created, were assigned to the same BU that is assigned to the user’s territory team. For more information about data access and users, see the topic, Multiple Business Units and Data Access, in the Securing Oracle Sales Cloud guide.

Sales Administrator Access to Business Units

Sales administrators, who are created as resources in the organization, have access to all of the data available in the BUs to which they are associated.

Use Case With Resources Across Business Units

In some cases, you may want to have certain types of users have visibility into data across BUs. For example, you may want your overlay sales representatives to have access to all BUs. Here are some examples:

- Associate overlay sales representatives with all business units and differentiate them using territory dimensions, such as geographic region of responsibility.
- Associate sales operations and sales administrators to one, many, or all business units.

In the use case, Vision Enterprises is a global high-technology company with two divisions: Vision Corp., focused on software, and Vision Systems, selling high-end servers and engineered systems that combine hardware and software in a single stack. Both divisions operate globally across North America, Europe, and Asia Pacific regions, so they create BUs for each of these areas.

The following figure shows the use case. The diagram shows Vision Enterprises as encompassing its two divisions, Vision Corp. and Vision Systems. The diagram shows the two divisions, Vision Corp. and Vision Systems, as each encompassing
three BUs: North America, Europe, and Asia Pacific. The diagram shows the following types of users having access to all BUs under both divisions: sales overlay team, sales operations, and sales administrators.

Associated Resource Organizations With Multiple Business Units: Procedure

By associating resource organizations with business units, you can control access to the transactional data available to sales resources in business objects like opportunities and leads.

Use the following procedure to associate resource organizations with multiple business units.

1. Sign in as a setup user and navigate to the Sales implementation project in the Setup and Maintenance work area.
2. Within the implementation project, click the Setup button.
3. In the Search Tasks box, search for the Manage Resource Organization Members task.
4. Select the task.
   The Manage Resource Organization Members page appears.
5. Search for and select the resource organization that you want to associate with a business unit.
   The Organization page appears for the selected organization.
6. In the Organization page, click the Business Units tab.
7. Click the Add Row icon.
8. Select a business unit from the Business Unit drop-down list.
9. Click Save. The first business unit you selected is set as the primary business unit.
10. Similarly, select additional business units from the Business Unit drop-down list.
11. Click Save and Close.

Multiple Business Units in Territories

Defining Territories Using Business Units: Explained

In Oracle Sales Cloud, you can use the Business Unit dimension in your territory setup to define territory coverage. A territory’s jurisdiction can include one, multiple, or all business units (BUs). In opportunity and lead assignment, when the BU associated with the opportunity or lead matches the BU mapped to the territory, the sales team members within that territory get assigned to the lead or opportunity product line.

When you implement territories, you will enable the Business Unit dimension. When you build your territory hierarchy, you can use the business unit dimension in the territory coverage. There is one territory hierarchy, with one top level territory. In a typical multiple business unit implementation, you define first-level territories by business unit.

The Business Unit dimension also helps facilitate the loading of territory metrics, partitioned by BUs.

💡 Tip: Remember, the application ignores the Business Unit dimension when assigning sales accounts.

BUs in Territories Use Case

The use case described here can aid your understanding of using Business Unit as a territory dimension. This use case is expanded from the Vision Enterprises use case used in the related topics on setting up multiple business units in Sales Cloud.

You will have one territory structure with one top-level territory. Below the top territory, the Vision Enterprises territory structure is defined as:

- One overlay territory that includes all products and all geographies. Child territories can be added to further delineate overlay team member responsibility by product or geography.
- A territory for each business unit. Child territories are defined by product or geography.

The following figure shows the use case. The diagram shows Vision Enterprises as encompassing its two divisions, Vision Corp. and Vision Systems. Each division has three business units, and therefore three first-level territories defined by these business units. The diagram shows an overlay territory defined with all business units, and the Vision Corp North America territory defined by the Vision Corp NA BU. It also shows the Vision Systems North America territory defined by the Vision Systems NA
BU. The Vision Corp NA territory has child territories defined by geography. The Vision Systems NA territory has child territories defined by geography and by product.

Multiple Business Units in Leads

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>
<tbody>
<tr>
<td>Lead Qualification Budget Status</td>
<td>• Approved&lt;br&gt;• Pending&lt;br&gt;• Unknown</td>
<td>The approval status of a customer budget. The data is used to assess the lead qualification status.</td>
</tr>
<tr>
<td>Lead Rank</td>
<td>• Cold&lt;br&gt;• Hot&lt;br&gt;• Warm</td>
<td>Lead rank values used as a measure of lead quality and prioritization.</td>
</tr>
<tr>
<td>Lead Reassignment Reason</td>
<td>• No activity&lt;br&gt;• Other&lt;br&gt;• Workload</td>
<td>Possible reasons specified for reassigning leads.</td>
</tr>
<tr>
<td>Lead Reject Reason</td>
<td>• Duplicate lead&lt;br&gt;• Failed to reach contact&lt;br&gt;• Incorrect data</td>
<td>Possible reasons specified for rejecting leads. Rejected leads can be reassigned or retired.</td>
</tr>
<tr>
<td>Lead Retire Reason</td>
<td>• Duplicate lead&lt;br&gt;• No purchase interest</td>
<td>Possible reasons for retiring leads. Retired leads are considered closed leads.</td>
</tr>
<tr>
<td>Lead Registration Type</td>
<td>• Co-sell&lt;br&gt;• Referral&lt;br&gt;• Resale</td>
<td>Types of leads available for partners.</td>
</tr>
<tr>
<td>Lead Source Channel</td>
<td>• Direct mail&lt;br&gt;• E-Mail&lt;br&gt;• Fax&lt;br&gt;• Marketing Cloud&lt;br&gt;• Phone&lt;br&gt;• Sales campaign&lt;br&gt;• Sales visit&lt;br&gt;• Social&lt;br&gt;• Company web site&lt;br&gt;• Wireless message&lt;br&gt;• Model-based prediction&lt;br&gt;• Rules-based prediction</td>
<td>Source channel responsible for lead generation.</td>
</tr>
<tr>
<td>Lead Time Frame</td>
<td>• 3 months&lt;br&gt;• 6 months&lt;br&gt;• 9 months&lt;br&gt;• 12 months&lt;br&gt;• 15 months</td>
<td>Lead cycle duration that usually coincides with a typical sales cycle duration for products and services offered.</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.

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. 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.</td>
<td>30</td>
</tr>
<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. 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.</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>
<tr>
<td>Qualification Assessment Template</td>
<td>Specify the assessment template to use for evaluating and qualifying leads.</td>
<td>None</td>
</tr>
</tbody>
</table>

### 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>
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:

1. 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.
2. Sign in to the application as the sales administrator or a setup user, such as application implementation consultant.
3. Create and activate a sandbox to work in.
4. Navigate to **Application Composer**.
5. In the Application Composer page, in the Application list of values, select **Sales** as the application.
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.
8. 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.
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**.
11. The Details Layout: Default custom layout page appears, with the name of the new layout in the page title.
12. In the Summary subtab region, click the edit icon.
13. 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.
14. Click **Save and Close**.
15. Click **Done** in the Details Layout: Default custom layout page.
16. 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:**

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.

17. Publish the sandbox.
18. The Business Unit field is now available to sales users in the edit lead simplified pages.

Mapping the Lead Business Unit for Territory Assignment: Procedure

A Business Unit (BU) represents a unit of the enterprise that performs a particular business function such as sales, service or marketing. This topic is applicable for the lead assignment set up where you want the BU to be used during territory assignment processing. In order to use the BU for territory assignment, you need to set up the assignment mapping between the lead BU field and the BU territory dimension.
The following procedure outlines the required setup for a scenario where your organization:

- Has multiple business units with defined territories
- Wants to assign sales leads based on the business unit

If the lead is contained in BU1, then you want to set up assignment mapping so that territory assignment only matches the BU1 territories along with any matching dimensions. For example, matching dimensions might include geography, product, account type, sales channel and so forth.

### Setting the Lead Business Unit Field to Active

To set the Business Unit mapping to active, perform the following steps:

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 Assignment Objects task.
   - The Manage Sales Lead Assignment Objects page appears.
3. In the **Name** column, locate and select **Sales Lead**.
4. In the **Sales Lead: Details** region, select the **Candidates** tab.
5. Select the **Sales Lead Territory** candidate.
6. Select the **Sales Lead Territory: Mapping Sets** tab.
7. In the **Name** column, select from one of the following active mapping sets for the sales lead object that you want:
   - **Mapping Set 1**
   - **Mapping Set 2**
   - **Mapping Set 3**
   - **Mapping Set 4**
   - **Mapping Set 5**
8. In the **Mapping Set: Mappings** region, locate and select the **BUnit** dimension function code.
9. Deselect the **Inactive** check box to make the function code active.
10. Repeat steps 7 through 9 for each sales lead Mapping Set.
11. Click **Save and Publish**.
12. Monitor and refresh the page to confirm the publish process has succeeded.

The sales lead assignment processing is now ready to use the active BU information when assigning territories.

### Multiple Business Units in Opportunities

#### Multiple Business Units in Opportunities: Overview

Using multiple business units in opportunities lets users associate opportunities and related attributes with a specific business unit (BU) and then report on the data by BU.

#### Business Units and Opportunity Attributes

In addition to associating an opportunity itself with a BU, you can also associate several opportunity attributes with business units.
The following opportunity attributes are set-enabled and hence allow association with a business unit and with reference data sets. Reference data sets let objects share reference data across BUs. For example, you can choose to have opportunity the Win/Loss Reason lookup type shared across BUs, or you can choose to have each BU manage its own. You can assign a reference data set to reference data objects, such as sales methods, in the Manage Set Assignments area in Setup and Maintenance.

- Opportunity lookup types:
  - Win/Loss Reason (MOO_SETID_WIN_LOSS_REASON)
  - Strategic Value (MOO_SETID_STRATEGIC_VALUE)
  - Opportunity Assessment Override Reason (MOO_SETID_ASSESS_OVRRIDE_RSN)
  - Decision Level (MOO_SETID_DECISION_LEVEL)
  - Estimated Deal Duration (MOO_SETID_DEAL_HORIZION)
  - Level of Risk (MOO_SETID_RISK_LEVEL)
  - Sales Revenue Type (MOO_SETID_REVENUE_TYPE)

- Sales methods
- Sales statuses

When you enable set-ID lookup types, you must assign them to a business unit in the Manage Set Enabled Lookups page in the Setup and Maintenance work area. To find this page, search for the task, Manage Set Enabled Lookups. For more information, see the related topic, Managing Set-Enabled Lookups: Example.

For more information about 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".

You can set several opportunity profile options at the business unit level, as well as specify the default sales method for a business unit. For more information, see the topic, Specifying Sales Business Function Properties: Procedure.

Specifying Opportunity Business Unit Properties: Procedure

You can set several opportunity profile options, including the one for default sales method, at the business unit (BU) level. When you set a profile option at the BU level, the profile option setting is effective for only the BU that you indicate. You set opportunity BU-level profile options in the Specify Sales Business Function Properties page. 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, set the profile options in the section, BU-Enabled Profile Options.
8. Save your changes.

**BU-Enabled Profile Options**

The following are the opportunity BU-enabled profile options.

<table>
<thead>
<tr>
<th>Profile Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Sales Method</td>
<td>Determines the default sales method the application picks when an opportunity is first created.</td>
<td>Standard Sales Process</td>
</tr>
<tr>
<td>Close Opportunity Win/Loss Reason Requirement</td>
<td>Determines whether, when closing an opportunity, the user is required to enter a win/loss reason. Applies both at the opportunity and revenue item levels.</td>
<td>Yes</td>
</tr>
<tr>
<td>Close Opportunity Competitor Requirement</td>
<td>Determines whether, when closing an opportunity, the user is required to enter a competitor. Applies both at the opportunity and revenue item levels.</td>
<td>Yes</td>
</tr>
<tr>
<td>Territory Based Resource Assignment Style</td>
<td>Determines whether the application copies all territory resources to the opportunity team or just the territory owner during territory assignment.</td>
<td>All</td>
</tr>
</tbody>
</table>

Another profile option you can set in the Specify Sales Business Function Properties page is the Close Opportunity Flow Enabled profile option. It applies only to the desktop UI. This profile option determines whether the close opportunity flow is enabled. A Yes value enables the Close Opportunity action in the edit opportunity UI and a close opportunity summary screen. A No value still allows salespeople to close an opportunity by setting the opportunity status to a closed status category.

**Related Topics**

- Setting Default Sales Method Profile Option
- Setting the Close Opportunity Profile Options

**Adding the Business Unit Field in Opportunities: Procedure**

Sales users can associate a business unit with an opportunity, if you have enabled the functionality. To enable the Business Unit list of values in the opportunities UI, use Oracle Application Composer to add the field to the opportunities UI.

**Adding the Business Unit Field**

Use Oracle Application Composer to add the Business Unit field to the opportunities UI. Available BUs display to users as a drop-down list in the Business Unit field. See the following procedure.

✏️ **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.


6. In the Opportunity: Pages page, ensure that the Simplified Pages tab is active.

7. In the Details Page Layouts region, select the Default Layout in the table and then click the edit icon. The Details Layout: Default Layout page 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 Summary subtab region, click the edit icon.

   The Details Layout: Default Layout: Edit Summary page appears.

9. In the Details Layout: Default 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.

10. Click Save and Close.

11. Click Done in the Details Layout: Default Layout page.

12. Validate the change by navigating to the edit opportunity 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.

13. Publish the sandbox.

14. The Business Unit field is now available to sales users in the edit opportunity simplified pages.

Enabling Opportunity Territory Assignment by BU: Procedure

A business unit (BU) represents a unit of the enterprise that performs a particular business function, such as sales, service, or marketing. You can configure the application to assign opportunities based on the BU. In order to use BU during territory assignment, you need to activate the assignment mapping between the opportunity revenue BU field and the BU territory dimension.

The following procedure outlines the required setup for a scenario where your organization:

- Has multiple BUs, with defined territories
- Wants to assign opportunities based on the BU

If the opportunity is contained in BU1, then you want to set up assignment mapping so that territory assignment only matches the BU1 territories, along with any matching dimensions. For example, matching dimensions might include geography, product, account type, and sales channel.

Setting the Opportunity Revenue BU Field to Active

To set the opportunity revenue BU field to active, perform the following steps:

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

   The Setup page appears with an offering selected.

2. In the Setup page, select the Sales offering.

   The Setup: Sales page appears with a list of functional areas.
3. Select the **Opportunities** functional area.

A list of required tasks for the area is displayed.

4. In the Show filter, select **All Tasks** to display additional tasks.

5. Select the Manage Sales Assignment Manager Objects task.

The Manage Sales Assignment Manager Objects page appears.

6. In the **Name** column, locate and select **Revenue**.

7. In the **Revenue: Details** region, select the **Candidates** tab.

8. Select the **Territory** candidate.

9. Select the **Territory: Mapping Sets** tab.

10. In the **Name** column, select **Sales Account Mapping Set**.

11. In the **Sales Account Mapping Set: Mappings** region, locate and select the **BUit** dimension function code.

12. Click the edit icon on the table to go into edit mode.

The Edit Mapping window appears.

13. Deselect the **Inactive** check box to make the function code active. Click **OK**.

14. Click **Save and Publish**.

15. Monitor and refresh the page to confirm the publish process has succeeded.

The opportunity assignment processing is now ready to use the BU information when assigning territories.

**Related Topics**

- Setting Up Opportunity Revenue: Points to Consider

**Additional Implementation Concepts for Business Units**

**Reference Data Sets: Explained**

Reference data sets are logical groups of reference data that various transactional entities can use depending on the business context. You can get started using either the common reference data set or the enterprise set depending on your implementation requirement. You can also create and maintain custom reference data sets, while continuing to use the common reference data set.

Consider the following scenario. Your enterprise can decide that only some aspects of corporate policy should affect all business units. The remaining aspects are at the discretion of the business unit manager to implement. This enables your enterprise to balance autonomy and control for each business unit. For example, your enterprise holds business unit managers accountable for their profit and loss, but manages working capital requirements at a corporate level. Then, you can let managers define their own sales methods, but define payment terms centrally. As a result, each business unit has its own reference data set for sales methods and one central reference data set for payment terms assigned to all business units.

**Partitioning**

Partitioning reference data and creating data sets provide you the flexibility to handle the reference data to fulfill your business requirements. You can share modular information and data processing options among business units with ease. You can create separate sets and subsets for each business unit. Alternatively, you can create common sets or subsets to enable sharing reference data between several business units, without duplicating the reference data.
The following figure illustrates the reference data sharing method (assignment to one set only, with common values). The user can access the data assigned to a specific set in a particular business unit, as well as access the data assigned to the common set.

Related Topics
- Reference Data Sets and Sharing Methods: Explained
- Defining Default Reference Data Sets: Points to Consider

Business Units and Reference Data Sets: How They Work Together

Reference data sharing enables you to group set-enabled reference data such as jobs or grades to share the data across different parts of the organization. Sets also enable you to filter reference data at the transaction level so that only data assigned to certain sets is available to be selected. To filter reference data, Oracle Fusion Human Capital Management (HCM), applications use the business unit on the transaction. To set up reference data sharing in Oracle Fusion HCM, you create business units and sets, and then assign the sets to the business units.

Common Set Versus Specific Sets

Some reference data in your organization may be considered global, and should therefore be made available for use within the entire enterprise. You can assign this type of data to the Common Set, which is a predefined set. Regardless of the business unit on a transaction, reference data assigned to the Common Set is always available, in addition to the reference data assigned to the set that corresponds to the business unit on the transaction.

Other types of reference data can be specific to certain business units, so you can restrict the use of the data to those business units. In this case, you can create sets specifically for this type of data, and assign the sets to the business units.
Business Unit Set Assignment

When you assign reference data sets to business units, you assign a default reference data set to use for all reference data types for that business unit. You can override the set assignment for one or more data types.

Example: Assigning Sets to Business Units

InFusion Corporation has two divisions: Lighting and Security, and the divisions each have two locations. Each location has one or more business functions.

The following figure illustrates the structure of InFusion Corporation.

When deciding how to create business units, InFusion decides to create them using the country and business function level. Therefore, they created the following business units:

- Sales_Japan
- Marketing_Japan
- Sales_US
- Sales_UK
- Marketing_India
- Sales_India

Because locations, departments, and grades are specific to each business unit, InFusion does not want to share these types of reference data across business units. They create a reference data set for each business unit so that data of those types can be set up separately. Because the jobs in the Sales business function are the same across many locations, InFusion decides to create one additional set called Jobs. They override the set assignment for the Jobs reference data group and assign it to the Jobs set. Based on these requirements, they create the following sets:

- Sales_Japan_Set
- Mktg_Japan_Set
Oracle Sales Cloud
Implementing Sales

Chapter 6
Setting Up Multiple Business Units

- Sales_US_Set
- Sales_UK_Set
- Mktg_India_Set
- Sales_India_Set
- Grades_Set

InFusion assigns business units to sets as follows:

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Default Set Assignment</th>
<th>Set Assignment Overrides</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales_Japan</td>
<td>Sales_Japan_Set for grades, departments, and locations</td>
<td>Jobs set for jobs</td>
</tr>
<tr>
<td>Marketing_Japan</td>
<td>Mktg_Japan_Set for grades, departments, and locations</td>
<td>None</td>
</tr>
<tr>
<td>Sales_US</td>
<td>Sales_US_Set for grades, departments, and locations</td>
<td>Jobs set for jobs</td>
</tr>
<tr>
<td>Sales_UK</td>
<td>Sales_UK_Set for grades, departments, and locations</td>
<td>Jobs set for jobs</td>
</tr>
<tr>
<td>Marketing_India</td>
<td>Mktg_India_Set for grades, departments, and locations</td>
<td>None</td>
</tr>
<tr>
<td>Sales_India</td>
<td>Sales_India_Set for grades, departments, and locations</td>
<td>Jobs set for jobs</td>
</tr>
</tbody>
</table>

When setting up grades, departments, and locations for the business units, InFusion assigns the data to the default set for each business unit. When setting up jobs, they assign the Jobs set and assign the Common Set to any jobs that may be used throughout the entire organization.

When using grades, departments, and locations at the transaction level, users can select data from the set that corresponds to the business unit they enter on the transaction, and any data assigned to the Common Set. For example, for transactions for the Marketing_Japan business unit, grades, locations, and departments from the Mktg_Japan_Set is available to select, as well as from the Common Set.

When using jobs at the transaction level, users can select jobs from the Jobs set and from the Common Set when they enter a sales business unit on the transaction. For example, when a manager hires an employee for the Sales_India business unit, the list of jobs is filtered to show jobs from the Jobs and Common sets.

The following figure illustrates what sets of jobs can be accessed when a manager creates an assignment for a worker.
Assigning Reference Data Sets to Reference Objects: Points to Consider

You can assign the reference data sets to reference objects using the Manage Reference Data Set Assignments page. For multiple assignments, you can classify different types of reference data sets into groups and assign them to the reference entity objects. The assignment takes into consideration the determinant type, determinant, and reference group, if any.

**Determinant Types**

The partitioned reference data is shared using a business context setting called the determinant type. A determinant type is the point of reference used in the data assignment process. The following table lists the determinant types used in the reference data assignment.

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset Book</td>
<td>Information about the acquisition, depreciation, and retirement of an asset that belongs to a ledger or a business unit.</td>
</tr>
<tr>
<td>Business Unit</td>
<td>The departments or organizations within an enterprise.</td>
</tr>
<tr>
<td>Cost Organization</td>
<td>The organization used for cost accounting and reporting on various inventory and cost centers within an enterprise.</td>
</tr>
<tr>
<td>Project Unit</td>
<td>A logical organization within an enterprise that is responsible for enforcing consistent project management practices.</td>
</tr>
<tr>
<td>Reference Data Set</td>
<td>References to other shared reference data sets.</td>
</tr>
</tbody>
</table>
Determinant

The determinant (also called determinant value) is a value that corresponds to the selected determinant type. The determinant is one of the criteria for selecting the appropriate reference data set.

Reference Groups

A transactional entity may have multiple reference entities (generally considered to be setup data). However, all reference entities are treated alike because of similarity in implementing business policies and legal rules. Such reference entities in your application are grouped into logical units called reference groups. For example, all tables and views that define Sales Order Type details might be a part of the same reference group. Reference groups are predefined in the reference groups table.

Managing Set-Enabled Lookups: Examples

Creating a new set-enabled lookup is similar to creating a standard lookup with the addition of specifying a reference data set determinant for the lookup codes. You can only create or edit lookup codes for a particular lookup type if its customization level supports it.

The reference data set for a set-enabled lookup code is part of its foreign key. This is unlike other set-enabled entities. Use the Manage Set Assignments task to define and manage reference data set assignments.

Selecting a Reference Group for a Set-Enabled Lookup Type

Specify a reference group for a set-enabled lookup type to indicate which reference data set assignments are available for its lookup codes. For example a COLORS lookup type might be set-enabled for a Countries reference group that includes the US and EU reference data set assignments.

Selecting a Reference Data Set for a Set-Enabled Lookup

The reference data set determines which lookup code is included in the list of values. If a COLORS lookup type contains a RED, YELLOW, ORANGE, and GREEN lookup code, you can enable one RED lookup as coming from the US reference data set and another RED lookup as coming from the EU reference data set with different meanings.

<table>
<thead>
<tr>
<th>Reference Data Set</th>
<th>Lookup Code</th>
<th>Lookup Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>US</td>
<td>RED</td>
<td>Red</td>
</tr>
<tr>
<td>US</td>
<td>YELLOW</td>
<td>Yellow</td>
</tr>
<tr>
<td>US</td>
<td>GREEN</td>
<td>Green</td>
</tr>
<tr>
<td>EU</td>
<td>RED</td>
<td>Rouge</td>
</tr>
<tr>
<td>EU</td>
<td>ORANGE</td>
<td>Orange</td>
</tr>
</tbody>
</table>

Some lookup codes may be unique to one or another reference data set as the ORANGE lookup is to the EU reference data set in this example.

In another example, a lookup type called HOLD_REASON provides a list of reasons for applying a hold to a contract renewal. Reference data sets determine which codes are included in the Hold Reason list of values.
As per the above example, when end-users place a contract on hold in the US business unit, the three reason codes in the US set are available. When placing a contract on hold in the China business unit, the two codes in the China set are available.

**Related Topics**
- Managing a Standard Lookup: Example

### Defining Default Reference Data Sets: Points to Consider

Assign a default reference data set to a new business unit. This default set will then be assigned to all the reference data objects for the business unit, such as such as payables payment terms, and receivables accounting rules. To assign the default set, select an existing reference data set or create a new one.

### Creating Default Reference Data Sets for a Business Unit

Use the Create Business Unit or the Edit Business Units pages to create a reference data set.

The creation of the reference data set for an existing business unit will not impact the actual sets previously assigned to the business unit. If you want to use the newly created set for your existing business unit use the Manage Set Assignments task, and assign the set to each reference data object you want to change.

**Note:** You must use the Manage Set Assignments task to assign the set to each specific reference data object that you want to change. In order to activate the set assignments, you must save the record, even if you have not made any updates.

### Creating Reference Data Sets in the Enterprise Structures Configurator: Explained

If you created business units automatically, then the Enterprise Structures Configurator automatically creates reference data sets for you. The Enterprise Structures Configurator creates one reference data set for each business unit. You can add additional sets, but you cannot delete any of the sets that were created automatically.
A standard set called the Enterprise set is predefined.

**Common Set**

The Common set is a predefined set that enables you to share reference data across business units. When you select set-enabled data at the transaction level, the list of values includes data in the:

- Common set
- Set associated with the data type for the business unit on the transaction

For example, when you create an assignment, the list of values for grades includes grade in the:

- Common set
- Set that is assigned to grades for the business unit in which you creating the assignment
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.

Introduction to Territories

Territories: Introduction

Territories are foundational components of Oracle Sales Cloud that enable many key Sales Force Automation (SFA) processes. This section introduces fundamental concepts of territory management. It provides an overview of key capabilities and explains how these capabilities can improve the overall performance of your sales organization. This section focuses on how you can use territories to:

- Model your sales organization hierarchy
- Assign the most effective sales team to your accounts and opportunities
- Provide shared data visibility to encourage collaboration and team cross-selling
- Optimize sales coverage and maximize revenue with balanced territories
- Reduce territory administration costs and errors

Modeling Your Sales Organization: Explained

One of the most critical aspects of a Sales Force Automation implementation is the definition of the sales organization hierarchy and the assignment of your sales resources within this structure. This structure represents how your sales force is organized internally and should be aligned with your sales strategy and how you sell in your marketplace. This structure drives data visibility for your sales users, rolls up the sales forecast, and aggregates data to measure performance at each level within your sales organization.
What's a Territory?

Depending on your specific industry and business model, a territory can be used to model any part of your sales organization. The following examples illustrate different scenarios:

- A territory can represent the responsibility of a salesperson such as a set of customers.
- A territory can represent the responsibility of a sales manager or executive such as geographic region, line of business, product line, customer segment, or sales channel.
- A territory can represent the responsibility of a channel account manager, including a specific set of partners and their respective sales activities.
- A territory can represent a branch or a sales office composed of a sales team that is collectively responsible for selling to customers in a specific geographic region.
- A territory can represent the jurisdiction of a channel partner such as authorizing the partner to sell a specific set of products to a set of customers.

Territories are organized in a hierarchy. While there is one single global territory structure for the entire enterprise, each branch of the overall structure represents a different part of the sales organization. The hierarchical relationship between territories at different levels defines how the data aggregation and visibility are rolled up.

Each territory is associated with one or more sales resources that form the sales team for that territory. Each resource on the territory team may have a designated function based on the role that team member has in the context of that territory. A resource may be assigned to multiple territories with the same or different roles.
The following figure shows an example of an international financial services company and its territory structure:

The overall structure shows different lines of business. Within the Personal Banking line of business, territories are further broken down by brand, geography (state, and then region), and branch. Using this same example, the Wealth Management line of business is organized differently as shown in the following figure:
For Wealth Management, territories are broken out by brand, customer segment, sales channel, and product line. This example demonstrates how a territory can be used to define different parts of your sales organization and how it can be organized in a hierarchical structure.

**Territory Assignment: Explained**

A key function of Oracle Sales Cloud is to automate assignment of territories to transactional objects including accounts, contacts, households, partners, leads, and opportunities. Territories are assigned to objects by matching territory coverage with attribute values of the object.
Territory Coverage

Territory coverage defines the boundary of each territory and in essence, describes the business rules by which assignments are performed. There are three primary ways that territory coverage can be defined:

- **Dimensional Coverage**
  This is a combination of dimensions with a list of values for each dimension. A territory dimension is mapped to an attribute on transactional objects during assignment processing. For example, the geography dimension on the territory is mapped to the address of the account or the partner. The following standard dimensions are provided: geography, product, industry, account type, organization type, customer size, and sales channel. Three additional dimensions are provided for you to configure to your business needs.

- **Inclusion Coverage**
  This specifies an explicit list of named accounts, contacts, households, or partners to be included.

- **Exclusion Coverage**
  This identifies a list of named accounts, contacts, households, or partners to be excluded.

Territory Coverage Examples

Territories can be defined using a combination of different coverage, thus giving your organization the power to model complex territories. A few examples that illustrate this follow:

- **Sam**
  Sam is a territory field salesperson who covers all the SMB accounts in California.
  Sam’s territory can be defined by using a dimensional coverage with two dimensions (Geography = California, Customer Size = SMB).

- **Steve**
  Steve is a key account director who covers three enterprise accounts, namely ACME Inc, Vision Corporation, and Pinnacle Technologies.
  Steve’s territory can be defined by using inclusion coverage with three explicit accounts: ACME Inc, Vision Corporation, and Pinnacle Technologies.

- **Amanda**
  Amanda is a territory field salesperson who covers all the high tech accounts in Northern California. In addition, ABC Technologies, located in southern California, was also assigned to Amanda because she has a prior relationship with the CFO.
  Amanda’s territory can be defined by using a dimensional coverage with two dimensions (Geography = Northern California, Industry = High Tech) and an inclusion coverage with one explicit account, ABC Technologies.

- **Kevin**
  Kevin is a BI Server product specialist who covers all accounts located in the Northwest region with the exception of Pinnacle Technologies. Pinnacle Technologies was assigned as a named account to a key account director.
  Kevin’s territory can be defined by using a dimensional coverage with two dimensions (Geography = Northwest, Product = BI Server) and an exclusion coverage with one excluded account, Pinnacle Technologies.

Territory Assignment Execution

You can configure when territories are assigned to transactional objects and the frequency the assignment process should be executed. Territories can be assigned in real time as new transactions are created or when existing transactions are updated. You can also configure territory assignment to be run as a background process to assign transactions in batch. This is the recommended approach if you have a large volume of transactions.

During assignment execution, transactional attribute values are matched against territory coverage and all matching territories are assigned to the object. As an example, on a given opportunity, you can assign multiple territories composed of the sales
team: the account representative, the industry overlay, a product specialist, the channel partner, and the channel account manager. This enables you to assemble the most effective sales team for each opportunity and to maximize your chances for closing the deal.

**Territory-Driven Visibility: Explained**

After territories are assigned to transactional objects, territory team members gain visibility into these objects through the territory hierarchy. In the following example, a salesperson Dave Smith has access to the account because his territory is directly assigned to the account record. His regional manager and sales director also gain access to the same account because their territories are ancestors of Dave’s territory. By contrast, Regional Manager 2 does not have access to the account because her territory is not a direct ancestor of Dave’s territory.

Combining flexible assignment rules and territory-driven visibility, Oracle Sales Cloud provides precise control over data visibility and data sharing policies. For large enterprise sales organizations with complex sales teams such as the following example, shared visibility on customer and opportunity data can further facilitate collaboration and team cross-selling.
 Territory Optimization: Explained

Oracle Sales Cloud enables you to model your sales territories in advance and evaluate the effectiveness of your territories using powerful what-if analysis capabilities. With these tools, you can easily determine if your territories are equitable and balanced or if there are any gaps or overlaps in your coverage. This provides sales leaders with valuable insights to optimize sales coverage.

Territory Proposals

Territory changes can be modeled using territory proposals. A territory proposal enables you to evaluate the business impact of territory changes prior to rolling them out to your organization, resulting in better business decisions.

What-If Analysis Capabilities

With Oracle Sales Cloud, you have access to numerous what-if analysis capabilities to assess the effectiveness of territory changes within a proposal, including the following:

- Territory Metrics
Oracle Sales Cloud offers a number of prebuilt territory metrics based on past revenue performance, as well as current sales pipeline and forecast. Leveraging these real-time metrics, you can create more equitable and balanced territories to optimize sales coverage.

- Territory Gap and Overlap Reports

Gaps in territory coverage can result in lost opportunities and revenue. On the other hand, overlaps in territory coverage can potentially cause channel conflict and encourage undesired sales behavior. You can identify such conditions in your territory model by running a set of prebuilt reports and then taking corrective action to proactively mitigate channel conflict and maximize revenue potential. (Run Load and Activate from the Enable Dimensions and Metrics page to use the latest geography data for these reports.)

- Assignments Preview

Within a territory proposal, you can preview how customers and inflight transactions would be reassigned resulting from the changes that you are making. This allows you to assess the business impact of these pending changes and identify mistakes before the changes are made effective. (Run Load and Activate from the Enable Dimensions and Metrics page to use the latest geography data and accounts for your assignment preview.)

**Territory Administration: Explained**

For many sales organizations, territory administration is a task that is performed on a daily basis to account for attrition or turnover of the sales force. In addition, major territory realignment resulting from sales reorganization or mergers and acquisitions can often take weeks, if not months, to implement. With Oracle Sales Cloud, using an intuitive user interface and bulk update capabilities, you can quickly and efficiently manage territory changes on an ongoing basis. This significantly reduces operational costs and increases business agility.

**Intuitive User Interface**

You can define territory assignment rules using flexible dimensional, inclusion, and exclusion coverage. This declarative approach of defining territories is more intuitive and suitable for business users such as sales operations staff. By contrast, many other Sales Force Automation applications require technical IT staff to write complex business rules or custom programs to make territory changes. This is time consuming and inefficient.

**Bulk Territory Changes Using File Import and Export**

To efficiently implement bulk territory changes resulting from major sales initiatives or reorganizations, you can leverage the round-trip file export and import capabilities. You can export current territory definitions into a file, update them en masse using an off-line tool such as Microsoft Excel, and import the changes.

You can also leverage the same file import and export capabilities to migrate territory definitions from a test environment to a production environment. This ensures that the production environment is an exact replica of what has already been verified in the test environment after migration.

**Delegated Administration**

For large enterprise companies, the responsibility of territory administration is commonly decentralized by lines of business, divisions, or regions. This can be easily accomplished by adding the regional administrator to the territory team of the top-level territory corresponding to the scope of delegation. For example, if you add an administrator to the territory team of the top-level territory for North America Sales, then she can administer all the descendent territories under North America Sales. However, this administrator has no access to other territories, such as those in the European region.
Territories: Additional Capabilities

This topic highlights additional capabilities in Oracle Sales Cloud that are supported by territories. The following areas use territories:

- **Forecasting**

  Sales Forecasting depends on having territories assigned to product items on opportunities. The forecast is then submitted and rolled up the management chain using the territory hierarchy.

- **Quota Allocation**

  You can distribute top-down quotas throughout your sales organization by leveraging the territory hierarchy. Use territory coverage and metrics to calculate quotas for sales resources based on current territory potential or past performance. This helps set more realistic and achievable quotas and allows for management by intrinsic data as opposed to opinions.

- **Intelligent Product Picker**

  Salespeople can become more productive when creating leads or opportunities in Oracle Sales Cloud. The product picker automatically applies filters to only show those products that are defined in the coverage of the salesperson’s territory.

- **Business Intelligence**

  A territory hierarchy and territory team can be fully leveraged in reporting and analytics. The territory hierarchy can be used as a dimension to aggregate data in building reports and key performance indicators based on your sales organization hierarchy.

Implementation Concepts for Territories

Territory Components: How They Work Together

Territories define the jurisdiction of responsibility of a salesperson. Sales administrators use territory proposals when they want to change the definitions of multiple territories, such as during annual realignments. All territories in the proposal become active on a set date. Managers can create more than one territory proposal and use metrics and graphs to compare and analyze their proposed territories for fairness, effectiveness, and alignment with current sales goals. Managers then activate the best territory proposals. Sales managers and administrators can use the simplified UI to directly change an active territory.
This figure shows the use of territory proposals to add, change, and delete territories. After analysis, managers activate final territory proposals.

**Territories**

A territory, whether active or part of a territory proposal, includes several elements. One or more dimensions, such as geography, define the boundaries of a territory according to selected dimension members, such as Europe or Asia. You can also select accounts, contacts, and households to be included in a territory. You assign one owner to each territory, and you can add territory team members.
This figure shows two territories defined using the same two dimensions but different dimension members. Each territory has an owner and a sales team.

Related Topics
- Territories Defined by Dimensions: Explained

Modeling Territories: Points to Consider

Model your territories to support your sales goals, such as the introduction of a new product, in addition to providing salespeople equitable territories to support their productivity. One salesperson can belong to multiple territories.

Sales Resource Structure
You can model territories as hierarchies that are similar to the sales resource hierarchy. For example, the sales manager owns the parent territory and the salespeople who report to the manager own child territories.

Multiple Sales Organizations
A higher level sales executive owns a parent territory with several child territories owned by senior managers. Each senior manager has a sales organization that focuses on selling to support a particular sales goal.

For example, one senior manager is at the top of a hierarchy of territories that are defined by geography. Another senior manager owns a territory hierarchy and sales organization who sell only to government customers. A third territory hierarchy supports selling the new product line to any customer with interest in the product. The fourth territory hierarchy assigns salespeople to specific important customers. Some of the senior managers create a child territory hierarchy to oversee partners.

Forecasts and Quotas
When you model your territories, you also want to think about how you want to manage your forecasts and quotas. Quotas are set and distributed from the top of the single overall territory hierarchy down through the levels of territories. A manager owner of the parent territory sets the quotas for the child territories and their owners.
Forecasts roll up the territory hierarchy. What forecasts, pipeline, and closed sales do executives want to monitor? Do they want to see how a new product line is doing? Watch over a country where you just started selling? Compare different industries? You can model your territory hierarchy to support your forecasting and sales analysis needs.

**Sales Goals**
You can model territories to support specific sales goals.

**Products**
You can designate a sales team to sell a particular product. Perhaps you have a group of products that requires specific technical expertise to sell it. Or you want to provide incentives to sell a new product line. Leads and opportunity line items that include a product will be automatically assigned to the territory defined for the product or a parent of the product in the sales catalog.

**New Customers**
Your sales analysts identified opportunities for finding new customers. You can model territories to support your sales goal to expand your customer base. Perhaps the analysts identified certain industries to be good prospects. You can define territories partly by the industry, and assign a sales team dedicated to pursuing customers in that industry.

You open a new geographic area. Territories not only take care of assigning accounts, contacts, households, leads, and opportunities to the salespeople in that region, but also provide the structure for monitoring and analyzing the sales forecasts and results for the new region.

**Security and Access**
You control access to accounts, contacts, households, leads, and opportunities partly with your territory structure. Salespeople have access to accounts, contacts, households, leads, and opportunities that fall within their territories. Salespeople assigned to the parent territory also have the same access to child territories and on down the hierarchy. To find other topics about security and access, search for accounts, customers, leads, opportunities, assignment, and security.

**Enabling Updates to Active Territories: Critical Choices**
You can enable the simplified UI for managing territories by enabling the additional option in the Enable Dimensions and Metrics task. Changes made in the simplified UI directly change active territories. You can continue to use territory proposals in the desktop UI.

**Leave Active Updates Disabled**
The default setting for the Enable Updates to Active Territories option is no. All changes to territories must be performed using territory proposals in the desktop UI. The proposed changes become active only when you activate a proposal.

**Enable Updates to Active Territories**
When you enable this option, you can maintain territories using the simplified UI. Any updates made in the simplified UI change the active territories when you save. You can also use the desktop UI to change territories using proposals, and easily switch between the two UIs.
Who Controls Territory Definitions: Critical Choices

Use territory proposals to make changes to your sales territories, whether performing an annual realignment or keeping up with personnel changes. Sales managers can define territories for their sales group, or you can have a centralized sales administrator make all territory changes.

Centralized

One person can create or change territory definitions for territory hierarchies owned by different sales managers. A sales administrator performs these actions for the entire organization in a centralized territory management model. Sales managers also are able to make changes as needed to their territory hierarchies.

Decentralized

In a decentralized model, sales managers make changes to territories for the territories below them in the hierarchy. Sales operations people can also take part in the decentralized model, often with limited responsibilities, such as one branch of the hierarchy. A manager can designate someone to be the administrator to perform territory management tasks for her on the territory branch the manager owns.

When does a territory administrator define territories?

Sales managers define territories because they have the knowledge about their assigned territory and about their salespeople, and are best able to assign territories equitably. Sales managers delegate the territory definition activity to sales operations to save time. Create an administrator who can modify all territories and quotas by giving her the Sales Administrator job role. Or select the Administrator check box for a territory team member in your territory. This person must also have a job role that includes the Territory Management Administration Duty. Now that person can view your territory and modify all territories lower in your territory hierarchy. He can also assign sales quotas for you.

Territory Dimensions

Territory Dimension Administration: Explained

Dimensions are attributes that define jurisdictional boundaries of territories. For example, you can use the geography dimension to define territories by country or postal code. Every customer that falls within the defined geography is assigned to the territory and to the sales team for that territory. You assign customers, partners, leads, and opportunity items to the correct territories using dimensions. All dimension values combine to define the territory boundaries. For example, if Geography is set to United States and Customer Size is set to Large, then the territory will be assigned to only large customers within the United States.

By default, you can define territories by selecting customers or partners to be included in the territory. You must enable dimensions before you can use them to define territories.
Dimensions

The dimensions available to assign customers or partners to a territory are:

- Geography
- Account Type
  The account type specifies if a customer is a named account or not.
- Customer Size
- Industry
- Organization Type
- Additional dimensions based on selected classification categories to match specific customer or partner information

A territory assigned to a customer or partner will also be assigned to the corresponding leads and opportunities. The following additional dimensions are available to define boundaries specifically for leads and opportunity items:

- Business Unit
- Product
  Product groups and products form a hierarchy in the sales catalog.
- Sales Channel
  The available sales channels are Direct, Indirect, and Partner.

You must enable each dimension that the sales organization plans to use for automatically assigning territories to customers, partners, leads, or opportunity items. All dimensions except account type require some preparation before you enable and use them.

Dimensions You Can Modify

The following dimensions are ready to use but can be modified:

- Customer Size
  You can change the provided customer sizes within the Organization Size lookup type.
- Industry
  The industry hierarchy is from the customer classification module. When you enable the Industry dimension in Enable Dimensions and Metrics, you must also select the classification category that you want to use. The available selections include only classification categories belonging to the Industrial Categories grouping. Your selection modifies the profile option Industry Classification Category.

  You can assign primary and nonprimary industry values to accounts. When an account is assigned multiple classification values, for the purposes of territory and rule-based assignment, the assignment engine can use all of the values or only the primary account classification. Opportunity assignment also supports multiple classification values. For more information on assigning accounts using industry classification codes, see the white paper, Industry Classification and Opportunity Assignment (Doc ID 2086014.1) available on My Oracle Support.
- Organization Type
  To change the available organization types, edit the Organization Type category using the Manage Classification Categories task in Setup and Maintenance. You can assign primary and nonprimary organization type values to accounts. When an account is assigned multiple classification values, for the purposes of territory and rule-based
assignment, the assignment engine can use all of the values or only the primary account classification. Opportunity assignment also supports multiple classification values. For more information on assigning accounts using industry classification codes, see the white paper, Industry Classification and Opportunity Assignment (Doc ID 2086014.1) available on My Oracle Support.

- Sales Channel
  You can add additional channels under the Partner sales channel.

Dimensions Requiring Preparation
See related topics to find out how to prepare the following dimensions:

- Business Unit
- Geography
- Product
- Additional Dimensions

Related Topics
- Multiple Business Units in Sales Cloud: Overview

Configuring Account Types for Territory Assignment
Accounts, households, and contacts are maintained using Manage Customers. Only those accounts, households, and contacts that are the customer type are assigned to territories by default. But you can change your configuration to assign prospects or other types as well.

Perform the following steps to prepare prospects:

1. Use Manage Customers to add prospect data or you can import prospect data.
2. You can change a profile option to assign prospects as well as customers to territories. To change the profile option perform the following steps:

   - Only prospects that are part of a customer hierarchy are available for inclusion or exclusion when defining territories.
     a. Go to the Manage Customer Center Profile Options setup task.
     b. Select the profile option ZCA_ASSIGNMENT_ACCT_TYPE_ENABLED, Account Types Enabled for Assignment
     c. Change the profile value to ZCA_CUSTOMER, ZCA_PROSPECT. Make sure you have no space between the two.

Preparing the Geography Dimension: Explained
If you plan to assign any objects to territories using addresses, then you must provide geography data for the Geography dimension members. The source master geography data is also used outside of territory definitions, such as for customer address validation. The same geography hierarchy is used for all applications.

The following steps implement existing geography data for use in the Geography dimension:

1. Go to the Manage Geographies setup task. For every geography level that you intend to use, switch on validation by checking the appropriate check box. Also set up the country validation level to Error.
Caution: If you have already created addresses before setting up geography validation for a country, then you must execute the Run Maintain Geography Name Referencing task for that country after enabling geography validation to ensure that all your geography elements are validated.

2. You must build one or more territory geography hierarchies using the Manage Territory Geographies setup task. You use geography elements from the master geography data to form your hierarchy. The hierarchies created in this step become geography dimension members available for defining territories.

Using custom zones is an optional feature of territory geographies. You can create a zone that is a parent of one or more master geographies. For example, you can create an Americas zone that includes several countries. The Americas zone becomes a dimension member that can be selected for defining a territory. Before you create zones, make sure all of your sales organizations agree with the definition of each zone.

3. Go to the Enable Dimensions and Metrics territory setup task.

4. Add Geography to the enabled dimensions.

5. Click Load and Activate to enable geographies.

A process also loads dimension member data for other enabled dimensions.

6. It is a good practice to run full reassignment processes for customers, leads, and opportunities after updating Geography dimension members in the previous step.

When changes occur in geography data, the changes are immediately available for territory definitions. Synchronization is not necessary.

Synchronizing Geography Data

When you define territories, you select geography data from the source geography hierarchy. The following features require geography data that is synchronized and resides in territory tables.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Setup</th>
</tr>
</thead>
</table>
| Territory gap report         | 1. Select the Enable territory validations option.  
2. Run Load and Activate, or perform the Run Territory Dimension Synchronization task to update the geography data used in detecting gaps.  |
| Territory overlap report     | 1. Select the Enable territory validations option.  
2. Run Load and Activate, or perform the Run Territory Dimension Synchronization task to update the geography data used in detecting overlaps.  |
| Customer assignment preview  | 1. Select the Enable customer assignment preview option.  
2. Run Load and Activate, or perform the Run Territory Dimension Synchronization task to update the accounts and geography data used in previewing customer assignments.  |

Related Topics

- Managing Geography Structures, Hierarchies, and Validation: Worked Example
- Creating Territory Zone Hierarchies
Preparing the Product Dimension: Explained

The Product dimension captures leads and opportunity line items to assign them to territories. You create a hierarchy of products and product groups in the sales catalog before enabling the Product dimension.

Salespeople can select the products or product groups when creating leads or opportunities. When you include a product group in a territory coverage, the territory then captures leads and opportunity line items containing a product within the hierarchy of the selected product group.

Tip: It is a good practice to initially set up your sales catalog using product groups, and then add individual products or inventory items if needed.

Perform the following steps to prepare the Product dimension:

1. Go to the Manage Product Groups setup task.
2. Create your root product group with the following settings:
   - Active
   - Root Catalog
   - Locked
   - Allow Duplicate Children deselected
3. Use the Subgroups tab to create product groups within the root catalog. You can create a hierarchy of product groups.
4. Publish your sales catalog.
5. Use the Manage Product Group Usage setup task to add your root product group as the Base usage
6. Go to the Enable Dimensions and Metrics territory setup task.
7. Add Product to the enabled dimensions.
8. Click Load and Activate to start the background process. The process loads the sales catalog data to become dimension members available for selection when defining territories. The process also loads dimension member data for other enabled dimensions.
9. When changes occur in the sales catalog, you must again run the Load and Activate process to update the Product territory dimension member data. You can perform the maintenance task Run Territory Dimension Synchronization to schedule the Load and Activate process.
10. It is a good practice to run full reassignment processes for leads and opportunities after updating Product dimension members in the previous step.

Related Topics

- Creating the Sales Catalog: Getting Started
- Creating a Sales Catalog: Worked Example

Creating an Auxiliary Territory Dimension

Watch: This video tutorial shows you how to create a classification category, associate it with an auxiliary territory dimension, and activate the account mapping for the dimension.
Creating Additional Dimensions: Explained

You can create up to three additional dimensions that will match with customer attributes.

Auxiliary Dimension 1, 2, or 3

You can define up to three customer auxiliary dimensions based on the customer classification model. Define classification categories first and associate them to the Customer Categories grouping.

The following steps must be done before you can enable auxiliary dimensions:

1. Use the Manage Classification Categories task to create a new classification category. You can allow parent code assignment. If you allow multiple class code assignments, then the classification that is designated as Primary in the customer record is the one that is matched to assign the customer to a territory.
2. Add classification codes for the new category. You can form a hierarchy with the codes or not.
3. Use the Manage Classification Groups task and search for the CUSTOMER_GROUP category group code. Edit the group and add your new classification category to the group.
4. Add an auxiliary customer dimension in Enable Dimensions and Metrics and select the correct classification category that you created. Then this classification category becomes the source for dimension members for the auxiliary dimension.
5. Load and activate your newly enabled dimensions.

Related Topics
• Creating Classification Categories and Codes
• Setting Up Custom Fields for Classifications Used in Territory Assignment

Populating Dimension Members: Explained

To be able to access dimension members when you define territories, you must populate dimension member data from source data for enabled dimensions. This is done using Oracle Business Intelligence Suite Enterprise Edition Plus. You must repopulate dimension members when source data changes, such as changes in the product catalog and the addition of new customers.

Cube

The cube provides metrics information for defined territories. The application generates the cube according to the enabled dimensions and their members. The application then loads the cube from the source data.

Prerequisite

The accounting calendar should be set up and the profile option CRM Common Calendar set. This calendar is used throughout Oracle Sales Cloud and controls the time periods for grouping metrics.

Sequence

Following is the sequence for setting up territory management:

1. Set up source data for the dimensions you plan to use. This includes:
    o Master geography and territory geography zone hierarchies
Territory Proposals

Territory Proposals: Explained

Territories are used to assign teams to leads, opportunity items, and customers. A territory proposal is a container used to model and explore territory definitions without affecting active territories. Activate a proposal to update the existing territory definitions.

Typical Territory Proposal Workflow

The following table shows a typical workflow for territory proposals.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a proposal</td>
<td>Create the proposal and set an activation date.</td>
</tr>
</tbody>
</table>
### Task Description

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add a territory to the proposal</td>
<td>Add an existing territory to the proposal, or create a new territory. Repeat for additional territories.</td>
</tr>
<tr>
<td>Define coverages</td>
<td>Select attributes to define the boundaries of each territory.</td>
</tr>
<tr>
<td>Select the territory team</td>
<td>Every territory must have an owner and can have additional team members.</td>
</tr>
<tr>
<td>Analyze and compare proposals</td>
<td>Review metrics and graphs to analyze proposals for such things as number of customers and amount of closed opportunity revenue in each territory.</td>
</tr>
<tr>
<td>Preview territory assignments</td>
<td>Preview assignments of customers, revenue, and leads for a proposed territory.</td>
</tr>
<tr>
<td>Activate the proposal</td>
<td>Activate a proposal. The proposal remains in pending activation status until the activation date is reached. You can reopen and update the proposal until then.</td>
</tr>
<tr>
<td>Run reassignment processes</td>
<td>Reassignment processes are scheduled to run periodically.</td>
</tr>
</tbody>
</table>

### Territory Proposal Statuses: Explained

A territory proposal contains definitions for territories. It progresses through different statuses in its life cycle. The following table describes proposal statuses.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>The proposal is first created, and different users can participate to make changes to their child territories.</td>
</tr>
<tr>
<td>Pending Activation</td>
<td>The owner requests that the proposal be activated. The proposal is in pending activation status until the activation date.</td>
</tr>
<tr>
<td>Activated</td>
<td>After the owner requested activation and the activation date is reached the proposal is activated and the territories become active.</td>
</tr>
<tr>
<td>Processing</td>
<td>Restoring a hierarchy to an historical definition starts a process to identify the changes needed in the proposal.</td>
</tr>
<tr>
<td>Failed</td>
<td>Any changes introduced to territories as part of this proposal are not made.</td>
</tr>
</tbody>
</table>
Territory Proposal Rules: Explained

Use territory proposals to explore and evaluate new territory definitions.

Keep these rules in mind:

- Only one definition for a territory can be active at a time.
- You must use territory proposals to create new or update existing territories.
- You can freely create, edit, and delete territories within a proposal without affecting active territory definitions.
- A territory owner can update a proposal with changes to a subordinate’s territory.
- If a given territory is updated in two different proposals, and both of them get activated, the changes of the proposal that’s latest to get activated will override the changes in the other proposal. A territory that is added to territory proposal A, but then deleted from proposal B which gets activated first, is reinstated when proposal A is activated.
- If a proposal contains territories added to a parent territory that is now deleted, the new territories are deleted during proposal activation.
- A maximum of 500 territories can be children of the same parent territory.

Scheduling Territory Processes: Procedure

You can make changes to many territories at one time using a territory proposal. If you schedule proposals to become active on certain dates, then you must schedule a background process to run periodically to perform the activation.

1. Sign in as a setup user or sales administrator.
2. Navigate to the Setup and Maintenance work area and search for the Run Territory Proposal Activation task.
3. Click Go to Task.
4. To run the process immediately, click Submit.
5. Schedule the Run Territory Proposal Activation process. Click Advanced.
6. Select Run Using a Schedule.
7. For Frequency, select Daily.
8. Select start and end dates and times.
9. Go to the Notification tab.
10. Click Create Notification.
11. Enter the e-mail for the person who should receive notifications.
12. In the Condition field, you should select On Warning and On Error as a minimum.
13. Click Submit.

Setting the Territory Proposal Profile Option

The application generates territory proposals, for example when processing territory inheritance. Every proposal must have an owner. To provide an owner for generated territory proposals:

1. Go to the Setup and Maintenance task Define Default Proposal Owner.
2. Select a resource to be the default owner.
3. Save.

This task sets the profile option MOT_DEFAULT_RESOURCE, Proposal Owner Default.
What's a territory overlap?

When two or more territories are children of the same parent, and reference the same intersection of dimension members, then the territories overlap.

The Overlap report only lists overlaps where the overlapping territories are children of the same parent territory. For example, a child territory with the dimension member Virginia and a child territory with the dimension member United States overlap. Only dimension members from the last full synchronization are used for the overlap report. Performing a Load and Activate in Enable Dimensions and Metrics synchronizes dimensions. Geographies are synchronized if you select the Enable territory validations option and then perform Load and Activate.

An overlap is a problem if it is accidental. If it results in two salespeople mistakenly assigned the same area, the overlap causes conflicts and incorrectly assigned sales quotas.

A deliberate overlap is useful for assigning additional salespeople or technical experts to the same areas also covered by the salespeople who have quotas. For example, the same area requires four salespeople with separate territories, but only one technical expert. It is a good practice to assign one of the territories the territory type of Overlay.

What's a territory gap?

A territory gap consists of a dimension member that belongs to a territory but does not belong to any children of that territory.

In this graphic the parent territory is defined by the size of the customer, and the available dimension members for customer size are small, medium, and large. There are child territories for small and medium sized customers, but the territory for large customers is missing and creates a gap.

Only dimension members from the last full synchronization are used for the gap report. Performing a Load and Activate in Enable Dimensions and Metrics synchronizes dimensions. Geographies are synchronized if you select the Enable territory validations option and then perform Load and Activate.
What happens if I select Forecasted by Parent Territory?

The territory is hidden in the Forecasting Overview page, but is available on the Edit Forecast page. The owner of the parent territory can submit the forecast for the child territory. If the child territory owner also owns the parent territory, then the territory owner can edit forecast items, add and remove forecast items as adjustments, and adjust the territory forecast.

Use Analytics to Test Territory Proposals: Examples

View graphs to compare your proposed territory changes to existing active territories to determine if your proposal achieves the goals you set. Will the new territories be more equitable and productive? Also, evaluate territory changes in multiple proposals, or see the results of territory changes made within a single proposal.

Scenario

You want to see how much the number of customers changed between the proposed territory version with new geographic boundaries and the active version. You select the territory and choose the Number of Customers metric for the current quarter and Version Comparison, Active Version Comparison. You see significantly more customers in your proposed territory.

Next you compare all child territories of the selected territory and see that only one child has a significant change in the number of customers and you determine that you need to realign the child territories.

Territory Coverage

Territory Coverage: Explained

A territory defines who will sell what to whom. It specifies the boundaries of a coverage area. You define boundaries using dimensions and criteria, not by specifying procedural rules.

You define a coverage area using the following:

- **Dimensions**
  
  Values that define what to include in the territory using categories such as geography, product, industry, and so on.

- **Inclusion Criteria**
  
  A list of specific customers or partners, whether or not they meet the dimensional definition. These customers do not have to be designated as Named accounts.
  
  - Customer Hierarchy: You can choose to include the customer hierarchy for the selected customer. All customers for the selected customer hierarchy will be assigned to the territory.
  
  - Filtering Conditions: Defined dimensions apply to the included customers and their hierarchies so that only customers that match the dimension definitions get assigned to the territory.
  
  - Other Dimensions: Product or sales channel dimensions defined for all of the included customers or partners.

- **Exclusion Criteria**
A list of specific excluded customers or partners to be omitted from the territory whether or not they meet dimension definitions. These customers do not have to be designated as Named accounts to be excluded. You can choose to also exclude the customer hierarchy for the selected customer.

- Overrides: A way to override what is inherited from a source territory.

**Note:** We recommend full reassignment to be scheduled for each object. The frequency of this schedule can be different from one object to another, depending on requirements.

### Territory Coverages for Partners

A partner is an organization party with a partner profile associated and an assigned Partner usage. Partners are defined in the Partner Center.

Similar to direct sales, channel managers have corresponding sales territories pertaining to partner sales activities. Some channel managers are assigned to specific partners. Some channel managers are assigned to customers for sales activities that involve partners. Channel manager territories can be defined by the following coverage models.

- **Coverage Defined by End Customer Characteristics (Customer-Centric)**
  
  Define the coverage using the characteristics of the end customer, and specific inclusions and exclusions. As an example, a channel manager is assigned to cover all the indirect opportunities where the end customer is located in California.

- **Coverage Defined by Partner Characteristics (Partner-Centric)**
  
  Coverage is defined using the following attributes of a partner organization:
  - Primary geographical location of the partner
  - Organization Type of the partner (for example, private, public, government owned, nonprofit)
  - Industries served by the partner (for example, high tech, manufacturing, banking, pharmaceutical)
  - Size of the partner
  - Three auxiliary dimensions are available for partners based on the customer categories classification model

- **Individually Selected Partners**
  
  Select partners to directly assign to or exclude from a partner-centric territory. As an example, a channel manager is assigned to a partner named AA Solutions. This channel manager will be assigned to all indirect opportunities where AA Solutions is the partner. The opportunities for included partners can be additionally qualified by product and sales channel.

### Territories with No Coverage

You can create a territory that has no coverage. The territory is indirectly defined by the coverages of its descendant territories. You can assign quota to the territory and it can participate in forecasting. The territory cannot be automatically assigned to customers, leads, and opportunities, but you can see the assignments of its descendant territories. You can also assign the territory to an opportunity item manually.

### Territory Coverage: Examples

A territory coverage is a set of boundaries that define what is included or excluded in the territory and what can be sold. Dimensional coverage consists of the combination of one or more territory dimensions. You can select individual customers...
(with or without a hierarchy) or partners to include or exclude from the territory in spite of dimension selections. The following scenarios illustrate using different coverages.

**Geography Territories with Customer Inclusion and Exclusion**

Two salespeople cover all customers in separate geographic areas, Texas and California. Tom owns the Texas territory, and Sue has California. Sue has a special relationship with the A1 customer located in Texas. The solution is to add A1 as a customer inclusion to Sue’s territory and as a customer exclusion in Tom’s territory.

The following figure shows Sue’s and Tom’s territories.

![Territory Diagram]

**Define Individual Customers Only**

Salespeople sell to ten to twenty individually assigned customers. You do not define a dimensional coverage, but manually assign the customers as inclusions.

**Key Accounts with Subsidiaries**

A Key Account Director is responsible for a few strategic accounts (named accounts) and all subsidiaries of the strategic accounts. You select each strategic account as an included customer, and choose to also include the hierarchy for each.

**Forecasting Using a Parent Territory**

You own an overlay territory that inherits coverages from several other territories. Create a parent territory with all the inheriting territories as children. The parent has no coverage except the coverages inherited by its children. You can designate each child territory as Forecasted by Parent Territory, and then perform all your forecasting activities for the inherited territories using the parent territory.

**Parent Territory with No Coverage**

The territories for your sales managers do not require boundary definitions separate from the territory definitions of their salespeople. Create a parent territory with no defined coverage for the manager. The managers can view and update the territories for their groups, have access to their transactions, and can forecast sales for the group.
The following figure shows the manager’s territory with no defined coverage as the parent territory of 3 salespeople’s territories.

![Territory Diagram](image)

**Using Territory Dimensions: Examples**

The sales administrator enables only the dimensions the organization requires for defining territories. The following examples illustrate the use of different dimensions to assign customers, leads, and opportunities to the correct salespeople using defined territories.

**Geography**
For most of your sales activities, you want to assign salespeople by state and postal code.

**Account Type**
You want to assign major customers to Named accounts territories. A named account territory can have child territories identified by additional criteria, such as geography. You also have territories with the account type of Not Named that include no major named accounts in the hierarchy.

**Customer Size**
One product line is suitable only for organizations above a certain size. Use the customer size dimension to target only the larger customers for the product line.

**Industry**
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.

**Product**
You sell a product line that requires salespeople to have a high degree of technical knowledge. Create separate territories for this product line.

**Sales Channel**
You delegate customers that are small to partner sales organizations by geography.
Creating Geographic Territories: Examples

A common method of dividing sales territories is by geography. Following are examples of assigning territories by geography.

Countries
You have a small sales team and sell products internationally by phone. All salespeople have the expertise to sell all products to all customers. You choose to define territories by country. There are too many customers in the United States for one salesperson, so you create territories for different states that have a parent territory for the country. You group several small countries by creating a parent zone in the geography hierarchy.

Postal Codes
Your company sells mostly through on-site visits to companies in a few major cities in North America and Europe. To service city customers adequately, you must assign several salespeople to each city. You choose to create territories defined by postal codes that form hierarchies with their parent territories, defined by country. Customers with locations that are not within the assigned postal codes get assigned to the parent country territory.

Creating Territories Using Multiple Dimensions: Examples

The following scenario illustrates using a combination of different dimensions to define a new hierarchy of territories.

Scenario
The telescope division of your company manufactures and sells a special type of microscope as well as related accessories and supplies. You currently sell mostly to medical laboratories throughout the United States, with a few sales to other industries. Your company recently started supplying microscopes to two large universities and several colleges in the East. Management wants to focus on expanding this new market by dedicating several salespeople to this industry, and by assigning individual universities to territories.
The following figure shows the current territory hierarchy for the division, divided into East and West United States with a parent territory to catch any accounts that are not identified as being within the United States. All territories for the Telescopes Division of the company include in the definition the product group: telescopes, accessories, and supplies.

Selling telescopes requires salespeople with more knowledge and experience. Therefore, you separate telescope sales from sales of accessories and supplies within each US region, as shown in the following figure. To accomplish this, you define the Telescopes territories with the Telescopes product and the Telescopes Supplies territories with the Telescope Supplies and Accessories product group.
Dimensions for the Telescopes East territory are:

- Geography: East United States
- Product: Telescopes
- Industry: Any

Dimensions for the Telescope Supplies East territory are:

- Geography: East United States
- Product: Telescope Accessories and Supplies
- Industry: Any

You add two child territories defined by Industry dimension members for 4 year colleges and universities, and 2 year colleges, as shown in the following figure. Within the 4 year colleges and universities territory, you add the two universities who are current customers as inclusions so they will have dedicated salespeople to service them.
Dimensions for the Colleges and Universities East territory are:

- Geography: East United States
- Product: Telescopes
- Industry: Colleges and Universities - 4 year

Dimensions for the Community Colleges East territory are:

- Geography: East United States
- Product: Telescopes
- Industry: Community Colleges - 2 year

Dimensions for each university territory are:

- Included Customer: Harvard (for the Harvard territory)
- Included Customer: Cornell (for the Cornell territory)
- Other Dimensions, Product: Telescopes

You build the West United States territory hierarchy in the same way, as illustrated in the following figure. Sales management identified three universities as named accounts even though they haven't yet purchased telescopes.
Exposing the Excluded Customers Region: Procedure

You can customize the Coverage tab to show the Excluded Customers region.

Perform the following steps to make the Excluded Customers region visible for all users in the territory simplified UI.

1. Sign in as a user with access to setups, or as an administrator.
2. Click the menu arrow next to your name and select Manage Customizations.
3. Select Site level.
4. Go back to the same menu and create a new sandbox.
5. Make your sandbox active.
6. From the menu under your name select Customize Work Area Pages.
7. Make sure Design is selected in the edit box at the top of the page.
8. Click any territory name to open the Edit Territory page.
9. Select the Coverage tab.
10. In the edit box at the top of the page click Select.
11. Click the Included Customers subheading and you see a box around the region.
12. From the menu that appears on the right, select Edit Parent Component.
13. Click Children.
14. Select the check box for Excluded Customers.
15. Click OK.
16. Select Design in the edit box.
17. Close the Edit Territory page.
18. Close the edit box at the top of the page.
19. From the menu under your name, click Manage Sandboxes.
20. Select to highlight the sandbox you created earlier.
21. Click Publish.
22. Click OK.
23. Navigate to the Coverage tab for any territory, and you will see the Excluded Customers region below the Included Customers region.
Source and Recipient Territories: How They Work Together

Sometimes organizations (for example, an industry overlay organization) shadow the prime sales organization. In this scenario, a shadowing territory’s coverage should change whenever the corresponding prime territory changes, with the exception of one or two dimensions, which become overrides.

Source and Recipient Territories

Create one territory as the source and let the shadowing territories inherit the dimension definitions from the one source. Then you only make changes in the one source territory, and the rest of the territories inherit the change. This is an easy way to keep dimension definitions synchronized for a number of territories.

In the following figure, the product dimension in the source territory changes from laptops to computers. The recipient territories automatically change to the product computers.

Customer or partner inclusions and exclusions can also be inherited. The source and recipient territories can have different territory owners and can be placed in different hierarchies.

Creating a Territory Inheritance: Procedure

You can set a territory as the source for the definitions of another territory. Then you only make changes in the one source territory, and the rest of the territories inherit the change.

Use the following procedure to start a territory inheritance:

1. Add a territory to a territory proposal to edit.
2. From the Actions menu, choose Edit Inheritance.
3. Select the territory that contains coverages (dimensions or inclusions and exclusions, or both) that you want your proposed territory to inherit. Your territory inherits all coverage information from this source territory, unless you use
overrides to change the coverage in the recipient. You can't have a chain of territory inheritances where territory B inherits from territory A, and B also is a source territory for territory C.

⚠️ **Caution:** If you delete a source territory, then automated updates to recipient territories cease.

4. Use overrides to modify what is inherited from the source.
5. Add any additional coverage definitions to your proposed territory.
6. Activate your territory proposal.

Recipient territories also inherit the Eligible for Quota, Revise Quota, Revision Reason, and Revision Description settings from the source territory.

### Changing and Ending Inheritance

After you make changes to a source territory, use the Update Recipients action in the Territories table on the proposal to start the Territory Inheritance Recipient Update background process to update the recipient territories.

You can change the source territory to none to end the automatic inheritance of territory definitions.

### Inherited Territory Coverage: Examples

Use territory inheritance to make coverage changes to one source territory and automatically propagate those changes to recipient territories that have an inheritance relationship to the source territory. Use overrides to change the dimensional coverage and other dimension information, and to qualify the included customers and their hierarchies to only those that match the override information.

In this example, three dimensions are enabled: geography, industry, and product. The following table provides the source territory definition.

<table>
<thead>
<tr>
<th>Coverage Type</th>
<th>Definition</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensional Coverage</td>
<td>Geography</td>
<td>Europe</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Industry</td>
<td>Any</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Product</td>
<td>Any</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer A</td>
<td>Is in the high tech industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer B</td>
<td>Is in the services industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer C</td>
<td>Is in the utilities industry</td>
</tr>
<tr>
<td>Filtering Conditions</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Other Dimensions</td>
<td>Product</td>
<td>Desktops, Laptops</td>
</tr>
</tbody>
</table>
Recipient Territory 1
The override for recipient territory 1 is Industry: Services.

The following table show the resulting coverage for recipient territory 1.

<table>
<thead>
<tr>
<th>Coverage Type</th>
<th>Definition</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensional Coverage</td>
<td>Industry</td>
<td>Services</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Geography</td>
<td>Europe</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Product</td>
<td>Any</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer A</td>
<td>Is in the high tech industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer B</td>
<td>Is in the services industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer C</td>
<td>Is in the utilities industry</td>
</tr>
<tr>
<td>Filtering Conditions</td>
<td>Industry</td>
<td>Services: Filters out Customers A and C</td>
</tr>
<tr>
<td>Other Dimensions</td>
<td>Product</td>
<td>Desktops, Laptops</td>
</tr>
</tbody>
</table>

Recipient Territory 2
The override for recipient territory 2 is Industry: High Tech.

The following table show the resulting coverage for recipient territory 2.

<table>
<thead>
<tr>
<th>Coverage Type</th>
<th>Definition</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensional Coverage</td>
<td>Geography</td>
<td>Europe</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Industry</td>
<td>High Tech</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Product</td>
<td>Any</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer A</td>
<td>Is in the high tech industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer B</td>
<td>Is in the services industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer C</td>
<td>Is in the utilities industry</td>
</tr>
<tr>
<td>Filtering Conditions</td>
<td>Industry</td>
<td>High Tech: Filters out Customers B and C</td>
</tr>
<tr>
<td>Other Dimensions</td>
<td>Product</td>
<td>Desktops, Laptops</td>
</tr>
</tbody>
</table>
Recipient Territory 3
The override for recipient territory 3 is Product: Laptops.

The following table show the resulting coverage for recipient territory 3.

<table>
<thead>
<tr>
<th>Coverage Type</th>
<th>Definition</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensional Coverage</td>
<td>Geography</td>
<td>Europe</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Product</td>
<td>Laptops</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Industry</td>
<td>Any</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer A</td>
<td>Is in the high tech industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer B</td>
<td>Is in the services industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer C</td>
<td>Is in the utilities industry</td>
</tr>
<tr>
<td>Filtering Conditions</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Other Dimensions</td>
<td>Product</td>
<td>Laptops</td>
</tr>
</tbody>
</table>

Territory Export and Import

Territory Export and Import: Overview

You can export any branch of territories to a spreadsheet, perform edits, and import your changes into a territory proposal. You can also export all territories from your test environment and import them to your active environment, replacing all records. If you use the provided spreadsheet format, then you can add new territories by importing the spreadsheets.

Four territory objects are exported and imported using the following four CSV files in a ZIP file:

- **Header (TERR_HEADER.CSV)**
  The Header file is always required for an import. The file includes the territory name, parent territory, and territory owner.

- **Resources (TERRRESOURCE.CSV)**
  The resources file is optional. It includes the territory name, resource name, resource function, and resource e-mail address. Use it to import additional territory team members, besides the owner.
• Lines of Business (TERR_LOB.CSV)
  The lines of business file is optional. It contains the territory name and the line of business for the territory.

• Coverages (TERR_COVERAGE.CSV)
  The coverages file is optional. It contains the territory name and all coverage definitions for each territory. The file lists all dimension members needed to define the territory. For every enabled dimension that is not included in the file, the dimension has the value Any. Included and excluded customers or partners are also listed.

Select Export or Import from the Actions list for the territories table in the Active Territories screen. The Territory Proposal screen has only export actions available. Two selections are displayed for both export and import: one for editing territories and one for moving territories to and from another environment.

Changing Territories Using Import

▶ Watch: This video tutorial shows you how to make changes to territory definitions by exporting the territories from the UI, making changes in .csv files, and from the UI importing the .csv files.

Moving Territories to Another Environment

▶ Watch: This video tutorial shows you how to migrate territory definitions from one environment to another.

Territory Header Import File Reference

You can export and import territories using a spreadsheet, from the Actions menu in the territories table in the Active Territories screen. If you use the provided spreadsheet format, then you can add new territories by importing the spreadsheets. This topic describes the spreadsheet and corresponding table columns for the TERR_HEADER.csv file. This file is required for imports.

TERR_HEADER.csv File

The following table lists the columns included in the Territory Header file along with descriptions and whether or not the column is used during the import process:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Import?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal_Use</td>
<td>Used only in the case of test to production export and import.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Original_Row_Number</td>
<td>This column is populated only in the rejected data file in case of import errors. It corresponds to the original line number in the input file used by the import process.</td>
<td>No</td>
</tr>
<tr>
<td>Language_Code</td>
<td>The language code used for translatable values. In the export file, this is based on the language of the user who triggered the import.</td>
<td>Yes</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Import?</td>
</tr>
<tr>
<td>-----------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------</td>
</tr>
<tr>
<td>Proposal_Number</td>
<td>The proposal number to which a given territory should be added. If specified, and the proposal already exists and is not activated, then the territory will be added to the proposal. If specified, and the proposal does not exist yet, then it will be created (with the name and number as in this file). If left blank, then the territory will be added to a new, generated proposal.</td>
<td>Yes</td>
</tr>
<tr>
<td>Proposal_Name</td>
<td>The proposal name to which a given territory should be added. It is used only when a proposal is created (there are no proposals with the number, as per previous entry, in the ). This name is ignored if the proposal (with the number) already exists, or if the proposal number was not specified.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Added_To_Proposal_Y_N</td>
<td>Indicates if the territory was added to the proposal at the time of export. The value is Y if, in the case of exporting from a proposal, the territory is added. In all other cases the value is N. This is for information purposes only. This field is not imported.</td>
<td>No</td>
</tr>
<tr>
<td>Action</td>
<td>Used only for the export-edit-import flow. The valid values are DELETE or REPLACE.</td>
<td>Yes</td>
</tr>
<tr>
<td>Territory_Number</td>
<td>Territory number as in the source environment. For new territories it can be specified or can be left blank. If blank, then the application will generate a number at the time of import.</td>
<td>Yes</td>
</tr>
<tr>
<td>Territory_Name</td>
<td>Territory name.</td>
<td>Yes</td>
</tr>
<tr>
<td>Parent_Territory_Number</td>
<td>The number of the parent territory. This is used to define territory hierarchy.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Parent_Territory_Name</td>
<td>The name of the parent territory. This is for information purposes only. This field is not imported.</td>
<td>No</td>
</tr>
<tr>
<td>Territory_Type</td>
<td>The name of the territory type, such as Prime or Overlay. Valid names are in the lookup type MOT_TERRITORY_TYPE.</td>
<td>Yes</td>
</tr>
<tr>
<td>Source_Territory_Number</td>
<td>The number of the source (inherited) territory. Used to define territory inheritance.</td>
<td>Yes</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Import?</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------</td>
</tr>
<tr>
<td>Display_Source_Territory_Name</td>
<td>The name of the source (inherited) territory. Used to define territory inheritance. This is for information purposes only. This field is not imported.</td>
<td>No</td>
</tr>
<tr>
<td>Partner_Program_Name</td>
<td>Name of the partner program.</td>
<td>Yes</td>
</tr>
<tr>
<td>Territory_Partner_Number</td>
<td>Unique identifier (Registry ID) of the territory partner.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Territory_Partner_Name</td>
<td>Name of the territory partner. This is for information purposes only. This field is not imported.</td>
<td>No</td>
</tr>
<tr>
<td>Coverage_Model</td>
<td>The name of the coverage model, such as Customer Centric or Partner Centric. Valid names are in the lookup type MOT_TERR_COVERAGE_MODEL.</td>
<td>Yes</td>
</tr>
<tr>
<td>Description</td>
<td>Territory description.</td>
<td>Yes</td>
</tr>
<tr>
<td>Fcast_Participation</td>
<td>The name of the forecast participation, such as Revenue or Nonrevenue. Valid names are in the lookup type MOT_TERR_FCST_PARTICIPATION.</td>
<td>Yes</td>
</tr>
<tr>
<td>Fcast_by_Parent_Territory_Y_N</td>
<td>Forecasted by parent (Y for yes, N for no).</td>
<td>Yes</td>
</tr>
<tr>
<td>Eligible_for_Quota_Y_N</td>
<td>Eligible for Quota (Y for yes, N for no).</td>
<td>Yes</td>
</tr>
<tr>
<td>Revision_Reason</td>
<td>The name of the reason for the quota revision, such as New Territory, Owner Changed. Valid names are in the lookup type MOT_QUOTA_REASON.</td>
<td>Yes</td>
</tr>
<tr>
<td>Revision_Description</td>
<td>Quota revision description.</td>
<td>Yes</td>
</tr>
<tr>
<td>Revised_Quota_Y_N</td>
<td>Indicates territory quota must be revised, due to a change in the territory (Y for yes, N for no).</td>
<td>Yes</td>
</tr>
<tr>
<td>Owner_Email</td>
<td>Owner e-mail address. This is also the owner’s identifier.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display.Owner_Name</td>
<td>Owner name.</td>
<td>No</td>
</tr>
<tr>
<td>Owner_Function</td>
<td>The name of the role (function) that the owner plays on the territory team, such as Salesperson or Legal. Valid names are in the lookup type MOT_TEAM_MEMBER_FUNCTION.</td>
<td>Yes</td>
</tr>
<tr>
<td>Column Name</td>
<td>Description</td>
<td>Import?</td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------</td>
</tr>
<tr>
<td>Owner_Administrator_Y_N</td>
<td>Is the owner a territory administrator? (Y for yes, N for no.)</td>
<td>Yes</td>
</tr>
<tr>
<td>Owner_Forecasting_Delegate_Y_N</td>
<td>Is the owner a forecasting delegate? (Y for yes, N for no.)</td>
<td>Yes</td>
</tr>
</tbody>
</table>

## Territory Resource Import File Reference

You can export and import territories using a spreadsheet, from the Actions menu in the territories table in the Active Territories screen. If you use the provided spreadsheet format, then you can add new territories by importing the spreadsheets. This topic describes the spreadsheet and corresponding table columns for the TERR_RESOURCE.csv file. This file is optional for imports.

### TERR_RESOURCE.CSV file

The following table lists the columns included in the Territory Resource file along with descriptions and whether or not the column is used during the import process:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Import?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display_Original_Row_Number</td>
<td>This column is populated only in the rejected data file in case of import errors. It corresponds to the original line number in the input file used by the import process.</td>
<td>No</td>
</tr>
<tr>
<td>Language_Code</td>
<td>The language code used for translatable values. In the export file, this is based on the language of the user who triggered the export. Objects, names, and keys that are translatable will be extracted from records in translation tables.</td>
<td>Yes</td>
</tr>
<tr>
<td>Territory_Number</td>
<td>Territory number as in the source environment. For new territories it can be specified or can be left blank. If blank, then the system will generate the number at the time of import.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Territory_Name</td>
<td>Territory name. Used only for a reference.</td>
<td>No</td>
</tr>
<tr>
<td>Resource_Email</td>
<td>Resource e-mail address. It is also the resource’s identifier.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Resource_Name</td>
<td>Resource name. Used as a reference only.</td>
<td>No</td>
</tr>
<tr>
<td>Resource_Function</td>
<td>The name of the role (function) that the resource plays on the territory team, such as Salesperson or Legal. Valid names are in</td>
<td>Yes</td>
</tr>
</tbody>
</table>

---

Oracle Sales Cloud
Implementing Sales

Chapter 7
Setting Up Geographies and Territories
Territory Line of Business Import File Reference

You can export and import territories using a spreadsheet, from the Actions menu in the territories table in the Active Territories screen. If you use the provided spreadsheet format, then you can add new territories by importing the spreadsheets. This topic describes the spreadsheet and corresponding table columns for the TERR_LOB.csv file. This file is optional for imports.

**TERR_LOB.csv File**

The following table lists the columns included in the Territory Line of Business file along with descriptions and whether or not the column is used during the import process:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Import?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display_ Original_ Row_Number</td>
<td>This column is populated only in the rejected data file in case of import errors. It corresponds to the original line number in the input file used by the import process.</td>
<td>No</td>
</tr>
<tr>
<td>Language_Code</td>
<td>The language code used for translatable values. In the export file, this is based on the language of the user who triggered the export. Objects, names, and keys that are translatable will be extracted from records in translation tables.</td>
<td>Yes</td>
</tr>
<tr>
<td>Territory_ Number</td>
<td>Territory number as in the source environment. For new territories it can be specified or can be left blank. If blank, then the system will generate a number at the time of import.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_ Territory_ Name</td>
<td>Territory name. Used only for a reference.</td>
<td>No</td>
</tr>
<tr>
<td>Line_of_Business</td>
<td>The name of the line of business. Valid names are in the lookup type MOT_LINE_OF_BUSINESS.</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### Territory Coverage Import File Reference

You can export and import territories using a spreadsheet, from the Actions menu in the territories table in the Active Territories screen. If you use the provided spreadsheet format, then you can add new territories by importing the spreadsheets. This topic describes the spreadsheet and corresponding table columns for the TERR_COVERAGE.csv file. This file is optional for imports.

#### TERR_COVERAGE.csv File

The following table lists the columns included in the Territory Coverage file along with descriptions and whether or not the column is used during the import process:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Import?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Original Row Number</td>
<td>This column is populated only in the rejected data file in case of import errors. It corresponds to the original line number in the input file used by the import process.</td>
<td>No</td>
</tr>
<tr>
<td>Language_Code</td>
<td>The language code used for translatable values. In the export file, this is based on the language of the user who triggered the export. Objects, names, and keys that are translatable will be extracted from records in translation tables.</td>
<td>Yes</td>
</tr>
<tr>
<td>Territory Number</td>
<td>Territory number as in the source environment. For new territories it can be specified or can be left blank. If blank, then the application will generate a number at the time of import.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display Territory Name</td>
<td>Territory name. Used only for a reference.</td>
<td>No</td>
</tr>
<tr>
<td>Coverage_Type</td>
<td>The coverage type such as: Dimensional, Inheritance, or Override. Valid names are in the lookup type MOT_TERR_COVERAGE_TYPE.</td>
<td>Yes</td>
</tr>
<tr>
<td>Dimension_Name</td>
<td>Valid values are:</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>- Customer</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Customer Auxiliary 1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Customer Auxiliary 2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Customer Auxiliary 3</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Customer Size</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Geography</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Industry</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Account Type</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Organization Type</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Partner</td>
<td></td>
</tr>
<tr>
<td></td>
<td>- Product</td>
<td></td>
</tr>
</tbody>
</table>
## Dimension Member Rules

Use the rules in the following table when entering dimension member keys or names. Dimension_Member_Name only needs to be specified for Product.

<table>
<thead>
<tr>
<th>Dimension Name</th>
<th>Comment</th>
<th>Dimension_Member_Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Type</td>
<td>Specify Named or Not Named.</td>
<td>Named / Not Named</td>
</tr>
<tr>
<td>Account Auxiliary 1..3</td>
<td>Enter a value as seen in territory UIs.</td>
<td>Value as seen in UIs.</td>
</tr>
<tr>
<td>Customer</td>
<td>Enter OS plus OSR Number (if known) or Registry ID (as seen in TM UIs). OS stands for Original System. OSR stands for Original System Reference. OS plus OSR exists only if customer data was imported from an external system.</td>
<td>OS plus OSR Number or Registry ID (as seen in UIs)</td>
</tr>
<tr>
<td>Customer Size</td>
<td>Enter a value as seen in territory UIs.</td>
<td>Value as seen in UIs.</td>
</tr>
<tr>
<td>Geography</td>
<td>If you know that a specific geography name is unique, then enter a value as seen in territory UIs, for example, Boston. If unsure, or if you know that the name is not unique, enter the full path such as United States<del>New York</del>New York. The full path is made up of geography members as seen in UIs concatenated with ~ character.</td>
<td>Value as seen in territory UIs, or a full path if the geography name is not unique.</td>
</tr>
<tr>
<td>Industry</td>
<td>Enter a value as seen in territory UIs.</td>
<td>Value as seen in UIs.</td>
</tr>
<tr>
<td>Organization Type</td>
<td>Enter a value as seen in territory UIs.</td>
<td>Value as seen in UIs.</td>
</tr>
</tbody>
</table>
### Territory Navigation in the UI

#### Defining the Territories UI and Hiding Navigation: Procedure

Profile options determine whether the landing page for territories is the desktop UI or the simplified UI. You can also remove the navigation icon from the springboard and the territories menu item from the navigation for individual users or at the site level.

**Defining the Landing Page**

To define the landing page:

1. Sign in as the sales administrator.
2. In Setup and Maintenance, navigate to the Manage Administrator Profile Values task.
3. Search for the profile option code `FND_CLASSIC_INTERFACE`. This profile option enables access from the Navigator and springboard to the desktop pages when there are desktop and simplified versions of the same page. If not set, the default is the simplified version.
4. You can set this profile option at the site level or for individual users. Choose one of the following settings:
   - Yes: The landing page is the desktop UI.
   - No: The landing page is the simplified UI.
5. Search for the profile option code `MOT_ALLOW_ACTIVE_VER_UPDATE`. This profile option allows active territories to be updated without proposals.
6. Enter one of the following settings for this site-level profile:
   - Y: The territories landing page is the simplified UI and users can make changes directly to active territories.
   - N: The territories landing page is the desktop UI and users cannot access the simplified UI used to directly change active territories.

Hiding the Territories Icon and Navigator Link

You can find Territories as an icon on the springboard, as a menu item in the Navigator, and as a structure entry. To hide the Territories icon on the springboard and the link in the navigator:

1. To remove the navigation for a user, sign in as that user.
2. Create a sandbox and make it active.
3. Navigate to **Structure** in the Tools menu.
4. Expand Sales and click **Territories**.
5. Check the Focus View ID. It indicates:
   - The user is set up to use the desktop UI icon if it is set to TerritoriesMain.
   - The user is set up to use the simplified UI icon if it is set to FuseOverview.
6. To hide just the Welcome Springboard icon, set the attribute **Show on Welcome Springboard** to N.
7. To hide both the Welcome Springboard icon and the Navigator link, set the attribute **Visible** to N.
8. Save and close.
9. Publish the sandbox.
8 Setting Up Work Assignment

Work Assignment: Overview

In Oracle Sales Cloud, you use the assignment engine to assign resources (for example, salespeople or territory owners) to the business objects they 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>
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.
   a. Add the first condition: Choose the object Sales Lead and attribute Budget Status, and then select the Equals operator. Select Approved.
   b. Add the second condition: Choose the object Sales Lead and attribute Budget Amount, and then select the Greater Than operator. Enter 500000.
   c. 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:
   a. 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.

**Account Assignment**
Sales Account Assignment Object: Explained

Territory-based assignment is based on the intelligent mapping of sales account assignment object attributes and sales territory dimensions. The assignment engine uses the Sales Account Assignment object to identify the sales accounts and to determine which territories to assign.

You can also add an account owner to the account territory mapping that enables the application to assign a territory based on the account owner’s territory. For example, if the account owner is mapped to the territory owner, then when you create an account, you are made the account owner.

Multiple Industry and Organization Classifications

You can assign primary and nonprimary industry and organization type values to accounts. When an account is assigned multiple classification values, for the purposes of territory and rule-based assignment, the assignment engine can use all of the values or only the primary account classification. Opportunity assignment also supports multiple classification values.

For more information on assigning accounts using industry classification codes, see the white paper, Industry Classification and Opportunity Assignment (Doc ID 2086014.1) available on My Oracle Support.

Sales Account Assignment Child Objects

The following table lists the sales account assignment child objects:

<table>
<thead>
<tr>
<th>Sales Account Assignment - Child Objects</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Represents a company you sell to</td>
</tr>
<tr>
<td></td>
<td>An account represents a company you sell to. If your business sells to a contact or household, an account represents the contact and household you sell to.</td>
</tr>
<tr>
<td>Account Auxiliary Classification 1</td>
<td>Multiple auxiliary classification codes associated with the account</td>
</tr>
<tr>
<td></td>
<td>Select this child object to enable account assignment by all account auxiliary classification 1 values.</td>
</tr>
<tr>
<td>Account Auxiliary Classification 2</td>
<td>Multiple auxiliary classification codes associated with the account</td>
</tr>
<tr>
<td></td>
<td>Select this child object to enable account assignment by all account auxiliary classification 2 values.</td>
</tr>
<tr>
<td>Account Auxiliary Classification 3</td>
<td>Multiple auxiliary classification codes associated with the account</td>
</tr>
<tr>
<td></td>
<td>Select this child object to enable account assignment by all account auxiliary classification 3 values.</td>
</tr>
<tr>
<td>Account Industry</td>
<td>Multiple industries associated with the account</td>
</tr>
<tr>
<td></td>
<td>Select this child object to enable account assignment by all account industry types.</td>
</tr>
<tr>
<td>Account Organization Type</td>
<td>Organization type classification code assigned to the account</td>
</tr>
<tr>
<td></td>
<td>Select this child object to enable account assignment by all account organization types.</td>
</tr>
</tbody>
</table>
Sales Account Assignment Object Attributes and Corresponding Customer Attributes

The following table lists sales account assignment object attributes and corresponding customer attributes, as shown on the Profile and Classification nodes of the respective information tree in Oracle Sales Cloud.

<table>
<thead>
<tr>
<th>Sales Account Assignment Object Attribute</th>
<th>Corresponding Oracle Sales Cloud Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geography Identifier</td>
<td>Sell-to Address</td>
</tr>
<tr>
<td>Industry</td>
<td>Primary Industry: The primary classification code for the classification category defined in profile option Industry Classification Category.</td>
</tr>
<tr>
<td>Organization Type</td>
<td>Primary Organization Type: The primary classification code for the classification category Organization Type defined in profile option Industry Classification Category.</td>
</tr>
<tr>
<td>Organization Size</td>
<td>Organization Size</td>
</tr>
<tr>
<td>Named Account Type</td>
<td>Named Sales Account Indicator</td>
</tr>
<tr>
<td>Party ID</td>
<td>Party ID</td>
</tr>
<tr>
<td>Auxiliary Dimension 1</td>
<td>The primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 1.</td>
</tr>
<tr>
<td>Auxiliary Dimension 2</td>
<td>The primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 2.</td>
</tr>
<tr>
<td>Auxiliary Dimension 3</td>
<td>The primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 3.</td>
</tr>
</tbody>
</table>

Related Topics

- Sales Accounts, Contacts, and Households: Explained

Account Territory Member Access: Explained

Access for the Territory owners and members parallels that of the team members. These access levels control the internal and partner territory privileges for the account:

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

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

- Account Team Member Access Levels: Explained

When are territories assigned to accounts?

Internal territories are assigned to accounts in the following scenarios.

- When accounts are created.
- When a sell-to address is added to an existing sales party.
- When accounts are imported in bulk.
- When certain attributes on accounts that correspond with territory assignment dimensions are updated.
- When batch assignment is run.
- When you select the Assign Territories menu action on the Sales Account Team node for the account.
- When territories are realigned or when personnel leave the territory or the company.
- When a sales manager reassigns all of the sales representative’s account to a different owner that triggers the reassignment of territories for those accounts to the new owner.

⚠️ Note: The following profile options determine whether territory assignment and reassignment is automatic for accounts. The default setting for both is YES.

- Sales Account Automatic Assignment on Create Enabled
- Sales Account Automatic Assignment on Update Enabled

Automatic assignments are always enabled following an import, party merge and territory realignment. During initial implementation and migration, it is possible to create accounts before territories have been set up in the application. These accounts will not receive any territory assignment because there are no territories. These accounts need to be explicitly assigned when territories are configured and activated in the application. This is one exception which does not have immediate/automatic assignment. The recommendation is to run a batch assignment to assign these accounts created at the beginning of the implementation using the view criteria `SalesAccountsUpdatedSinceVC`.

When you make a field conditionally required on an account, then add the following groovy script before adding your business logic:

```java
if (userName=='FUSION_APPS_CRM_SOA_APPID'|| userName()=='FUSION_APPS_CRM_ESS_APPID')
    return false
```

Partner territories get assigned to accounts in the following scenarios.

- When a partner-generated lead is approved, all partner territories associated to the partner-generated lead are automatically assigned to the account.
- Users with the privilege Manage Sales Party Partner Territory can assign partner territories from the account team UI.

⚠️ Note: Territory Management must be implemented to utilize this feature.
How can I add territories to an account?

Oracle Sales Cloud assignment capabilities match territories and accounts based on assignment setup. An account can also be assigned to one or more internal and partner territories.

You can assign internal territories, such as Prime, Overlay, as well as Sales Channel Manager territories, matching a given account’s assignment attributes, to the account. By default, Internal territory assignment runs immediately and automatically whenever account assignment or reassignment is required. For example, you can run assignment processing when you create or update an account.

You can run territory assignment when viewing or editing your accounts. Just navigate to your account details, verify relevant attributes like address, industry, and so on and run the assignment process manually using the Action button.

Additionally, you can run account assignment in a batch on a scheduled or one off basis, or following a territory realignment.

Partner territories are applicable to Oracle Sales Cloud partner management implementations. When you approve a partner lead, any partner territories associated to the lead are automatically assigned to the lead’s account. Channel managers can also select specific partner territories to assign to an account with the Add Partner Territories action on the Account Team page.

Related Topics
- Territory Components: How They Work Together
- Territories Defined by Dimensions: Explained

Sales Party Profile Options: Explained

There are several sales party profile option settings that affect sales accounts.

Set up the following profile options:
- Auto-assign Sales Account on Create
- Auto-assign Sales Account on Update
- Set Sales Account Existing Flag
- Usage for Defining Existing Sales Accounts
- Enable Merge Request

Auto-assign Sales Account on Create
Use this option to indicate whether to automatically run territory assignment for a sales account when it is initially created.

Auto-assign Sales Account on Update
Use this option to indicate whether to automatically run territory assignment for a sales account when it is updated.

Set Sales Account Existing Flag
Use this option to indicate whether the Existing Sales Account setting is updated manually or automatically for a sales account. When you set this option to Automatic, use the Usage for Defining Existing Sales Accounts profile option to indicate the party usage that defines a sales account as an existing sales account.
Usage for Defining Existing Sales Accounts

Use this option to indicate the party usage that defines a sales account as an existing sales account.

Enable Merge Request

Use this option to indicate whether a merge request can be launched from Accounts or Contacts, and from the Customer Search Results page.

Opportunity Assignment

Opportunity Team Assignment: Explained

Team members (sales resources) are assigned to an opportunity either automatically by the assignment engine or when you add them to the sales team while editing an opportunity.

The following sections discuss ways to assign team members to an opportunity.

Batch Method

The preferred way to assign team members is using a batch process, also known as a scheduled process. The two processes for opportunity assignment are:

- Revenue Territory Territory Based Assignment: Use this process to run territory-based assignment on opportunity product lines. During this process, the application evaluates every product line in the opportunity batch. Territories whose dimensions match the dimensional attributes of a given product line are then assigned to that line.

- Opportunity Resource Rule Based Assignment: Use this process to run rule-based assignment on opportunities. During this process, the assignment engine executes a set of rules, as defined in the profile option, Sales Team Member Assignment Rule Set Group, to find matching candidates for opportunities. If matching candidates are found, they are added to the opportunity team. Note that team members for whom lock assignment is disabled will be replaced if they no longer match the assignment rules.

⚠️ Caution: These batch processes should not be requested to run in parallel against the same opportunity batch, to avoid potential locking issues. The scheduling service checks for such incompatibilities prior to initiating the assignment process.

Manual Method

Users with Full access to an opportunity can manually assign or re-assign sales team members, including the opportunity owner. If an opportunity is re-assigned to a new owner manually, the original owner stays on the sales team as a non-primary team member, unless he is manually removed from the team.

Resource Recommendations

From within an opportunity in the desktop UI, users can select the View Recommendations action to request that the assignment engine retrieve sales team member recommendations based on predefined assignment rules. The user can then add candidates from the recommended list to the sales team. The application will not recommend resources that are already on the opportunity sales team.
The profile option, Sales Team Member Recommendation Rule Set Group, specifies the assignment rule set group to be used when recommending resources.

**On-Demand Method**

From within an opportunity, sales representatives can use the assign opportunity action to run the assignment engine to automatically assign, in real time, resources to the opportunity. Based on the setting of the profile option, Opportunity Assignment Mode, the assignment engine uses territory-based assignment, rule-based assignment, or both.

**Saving an Opportunity**

If the profile option, Assignment Submission at Save Enabled, is yes, when you save an opportunity, the assignment engine runs assignment on the opportunity. In a similar way that on-demand assignment happens, the assignment engine uses territory-based assignment, rule-based assignment, or both, based on the profile option, Opportunity Assignment Mode.

**Territory Activation**

After a territory is activated, opportunities are automatically re-evaluated and territory assignments are updated. Depending on the setting of the profile option, Territory Based Resource Assignment Style, the application either adds the owners or all members of the assigned territories to the opportunity team.

Note that territory activation does not trigger rule-based assignment.

**Setting Initial Opportunity Assignment Profile Options**

Whether you are using territory-based assignment or rule-based assignment or both to assign resources to opportunities, initially in your implementation you should validate the setting of the two profile options discussed in this topic.

**Setting Opportunity Profile Options**

Use the following procedure to set opportunity profile options:

1. As a user with access to the profile option screens, such as the sales administrator or the setup user you created earlier in this guide, navigate to **Setup and Maintenance**.
2. Search for and select the task, Manage Opportunity Profile Options. The Manage Opportunity Profile Options page appears.
3. In the search region, select **Opportunity Management** as the application, or just enter the profile option name directly in the **Profile Display Name** field.
4. In the list that is returned, click on the profile option to retrieve the details about the profile option.
5. Set the profile option as needed.

**Setting Opportunity Assignment Mode Profile Option**

The profile option, Opportunity Assignment Mode, specifies whether you are using territory-based assignment, rule-based assignment, or both. The default value is Territory-based Assignment Only. If you are using territory-based assignment only, ensure that the profile option is set to **Territory-based Assignment Only**.

**Setting Assignment Submission at Save Enabled Profile Option**

The profile option, Assignment Submission at Save Enabled, specifies whether to run assignment on an opportunity when it is saved in the UI. The default value is No. If you want assignment to run anytime users save an opportunity, set the profile option to **Yes**.
How are territories assigned to opportunities?

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

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

Profile options set by the administrator determine the following:

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

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

**Related Topics**

- What’s assignment manager?

How can I manually add territories to an opportunity?

You can manually assign territories to one or more additional salespeople on a product line in order to allow another salesperson working the deal to forecast it in his territory. Manual assignment may be required, for example, to even out a temporary unbalanced load between salespeople reporting to a manager, or to accommodate a salesperson on extended vacation.

You manually assign territories in the assign sales credit screens or in the details of the revenue line by using the territory list of values.

You must have the Sales Administrator job role to perform manual territory assignment on opportunities.

Which fields in an opportunity drive assignment?

The following fields drive opportunity assignment: Sales Account, Sales Channel, Product, and Partner (for assigning partner-centric territories).

Other, peripheral, sales account and partner attributes also drive assignment, but are not captured or displayed in the opportunity. Examples of these other attributes include: Geography, Named/Not Named, Industry, Organization Type, Partner Type, Customer Size, Account Type, and Classification.
What's lock assignment?
Lock assignment prevents a salesperson from being automatically removed from an opportunity through the assignment engine. Only users with Full access on the opportunity can check or deselect the Lock Assignment check box for sales team members.

Deal Protection on Opportunities: Explained
When a sales territory is assigned to an opportunity product line, the application copies over the territory resources (salespeople) to the opportunity sales team. When territory realignment happens, ineligible territory resources are removed from the sales team, unless you enable deal protection. You enable deal protection by setting the profile option, Opportunity Resource Deal Protection Period (MOO DEAL PROTECTION_PERIOD). The profile option is set to 0 by default.

Note: When you set the deal protection profile option, all existing sales team members are protected from realignment for that number of days.

Enabling Deal Protection

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

   The Manage Opportunity Profile Options page appears.
3. In the Search region, enter Opportunity Resource in the Profile Display Name field.
4. In the MOO DEAL PROTECTION_PERIOD: Profile Values region, in the Profile Value field, enter number of days you want the deal protection to be in effect for. For example, enter 15 if you want the deal protection to be in effect for 15 days.
5. Click Save and Close.

Related Topics
- Territory Components: How They Work Together

Sales Credit Recipient and Forecast Territory Defaulting Logic: Explained
The application uses rules to set default sales credit recipients and forecast territories.
When a product line is first added and saved on an opportunity, the application sets the line creator as the sales credits recipient at 100 percent. You can edit the default credit allocation, and you can add additional sales credit recipients as needed.

Note: Nonrevenue credit recipients are never set by default and must be added manually.

After opportunity assignment is run, the application processes the existing credit allocations for each assigned product line to make sure that only an eligible territory is set as the forecast territory, and that the credit recipient is an eligible resource from
the forecast territory. This process is important because the revenue or nonrevenue sales credit amounts are automatically rolled into the territory’s forecast when the product line is added to the forecast.

### Default Forecast Territory Logic

When setting the default forecast territory, the application uses the following logic:

- Keep the forecast territory the user selected, as long as it is still assigned to the product line and its forecast participation type matches the sales credit type.
- Use the existing credit recipient to derive the forecast territory, whenever possible.

When setting default forecast territory:

- If the current forecast territory for the sales credit is one of the assigned territories with a matching forecast participation type, the application leaves it unchanged.
- If there is only one territory with a matching forecast participation type, the application sets that territory as the forecast territory.
- When there are multiple territories with a matching forecast participation type, the application chooses the forecast territory using the following precedence:
  - Territory where the existing credit recipient is the owner
  - Territory where the existing credit recipient is a member
  - Territory with a matching forecast participation type with the latest effective start date
- When there is no matching territory, the application sets the forecast territory to null (this implies that there is a gap in the territory hierarchy). If the forecast territory for a sales credit allocation has been set to null and opportunity assignment was done from the UI, a warning message appears.

### Default Credit Recipient Logic

Generally, a sales credit recipient selected by the user does not get replaced by the application unless he is no longer a qualified credit receiver. The application does not change the recipient if:

- The Lock Owner setting for the revenue item is enabled.
- The current credit recipient is under deal protection.
- The current credit recipient is an owner or member of the forecast territory.

If the above criteria are not met, the application sets the forecast territory owner as the new credit recipient.

### Related Topics

- Sales Credits: Overview
- How can I lock in a sales credit recipient?
- Setting Opportunity Revenue Forecast Criteria

### Opportunity Team Profile Options: Points to Consider

Set profile options to specify the following for opportunity team functionality:

- The default access level for internal resources added to the sales team
• The default function for internal resources added to the sales team
• The default deal protection period for team members
• The default access level for partner resources added to the sales team
• The default function for partner resources added to the sales team
• The rule category to use for filtering during opportunity territory-based assignment
• Whether to add all members of a territory or only the owner during assignment
• The assignment rule category to automatically assign team members to opportunities
• The default rule set to use during team member assignment
• The default rule set to use during team member recommendations
• The type of assignment modes to perform during on-demand or automatic opportunity assignment
• Whether assignment is performed automatically at opportunity save

Opportunity Team Profile Settings
The following table lists the profile options that affect opportunity team assignment and other team functionality. If the profile option does not have a default value, the Default Value column in the table is blank.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal Resource Sales Team Access Level Default</td>
<td>Edit</td>
<td>Determines the default access level for an internal resource added to the sales team.</td>
</tr>
<tr>
<td>Internal Resource Sales Team Function Default</td>
<td>Integrator</td>
<td>Determines the default function for an internal resource added to the sales team.</td>
</tr>
<tr>
<td>Opportunity Resource Deal Protection Period</td>
<td>0</td>
<td>Specifies the default number of days that territory resources are protected to stay on a deal, even if ineligible through territory realignment.</td>
</tr>
<tr>
<td>Partner Resource Sales Team Access Level Default</td>
<td>No Access</td>
<td>Determines the default access level for partner resources added to the opportunity sales team.</td>
</tr>
<tr>
<td>Partner Resource Sales Team Function Default</td>
<td>Integrator</td>
<td>Determines the default function for partner resources added to the opportunity sales team.</td>
</tr>
<tr>
<td>Territory-Based Assignment Rule Category</td>
<td></td>
<td>Specify the rule category used for rule filtering during opportunity territory-based assignment.</td>
</tr>
<tr>
<td>Territory Based Resource Assignment Style</td>
<td>All</td>
<td>Determines whether to copy all territory resources to the opportunity team or just the territory owner during territory assignment.</td>
</tr>
<tr>
<td>Sales Team Member Assignment Rule Category</td>
<td></td>
<td>Specify the assignment rule category used by the automatic assignment process to assign sales team members to opportunities.</td>
</tr>
</tbody>
</table>
### Profile Option Display Name | Default Value | Effect
--- | --- | ---
Sales Team Member Assignment Rule Set Group |  | Specifies the rule set name that is used during rule-based assignment triggered by assignment manager.
Sales Team Member Recommendation Rule Set Group |  | Specifies the rule set name used during rule-based assignment when a user uses the team recommendations functionality.
Opportunity Assignment Mode | Territory-based Assignment Only | Determines the types of assignment modes allowed during opportunity assignment.
Assignment Submission at Save Enabled | No | Determines whether the assignment engine is started automatically when an opportunity is saved.

## Lead Assignment

### 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.

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.

emd> 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

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 Status: How It Automatically Is Set

Lead quality is assessed as soon as a lead is generated. This topic describes the settings that are used to determine the qualification status of a sales lead. Lead quality of a newly created lead is based on the following:

- Characteristics of the customer contact on the lead
- Type of response which caused the lead to be generated
- Stage and type of the campaign

Lead quality is further assessed based on added qualification data such as customer need, urgency or time frame for the project, and whether a budget is approved for the product.

Settings That Affect Lead Qualification Status

Leads can get their qualification status from:

- Assignment manager engine rules
  Rules-based leads qualification process helps standardize the lead qualification process. Based on the positive results to conditional rules, the value of the Lead Status attribute is set to Qualified. For example, a rule can be defined to update the lead as qualified if the:
    - Customer’s budget status is approved
    - Project time frame is three months
    - Decision maker is identified
    - Response type is that the customer attended an event
- A specified value in the campaign lead generation stage
  A multistage campaign design can include lead generation stages. Lead options include the ability to designate a value for the qualification status. When the campaign is executed, leads are created with the qualification status value provided.
- An imported value
  Leads imported through file import can include a designated lead qualification status.

How Lead Qualification Status Is Calculated

In some companies, the lead qualification data gathered by lead qualifiers is considered in the scheduled automated process that calculates lead score or lead rank as well as assigning sales team territories. For such companies, a simple rule to move leads to a Qualified status when the lead score reaches a specific threshold is sufficient.

Lead Qualification: Explained

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

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

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

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

Additional Lead Qualification

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

Related Topics
- Defining a Sales Lead Qualification Template: Example

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

**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

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 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:
   - Object: Sales Lead Work Object
   - 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

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

- What’s the difference between rule-based and territory-based assignment?

Partner Assignment

Partner Territory Assignment: Explained

Companies can have thousands of partners, so it is useful to automatically give groups of users access to partner accounts and to the leads and opportunities for those accounts. In Oracle Sales Cloud, you can use Partner Territory Assignment to perform this task.

The available assignment types are:

- Immediate assignment
- Batch assignment
- Manual assignment

You can use the following methods to determine assignment:

- Partner Account Belongs To: For attributes used to match against partner-centric coverage territories
- Partner Account Serves To: For attributes used to match against sales-centric coverage territories.

You must be on the partner team with full access and have the Partner Account Maintenance or Administration Duty role to perform manual and batch assignment.

All members of the internal territory, including owner and resources, have full access to the partner information delivered. You can also assign view access by using the Territory Resource Review Duty. Members of parent territories inherit the access level of the child territory’s members.

Immediate Assignment

Partner account assignment can run automatically whenever partner account assignment or reassignment is needed, such as:

- When partner accounts are created or updated.
- When partner accounts are imported: in this case, you can specify for each partner record whether to run the assignment.

You use two profile options to enable or disable automatic assignment:

- Partner Account: Automatic Assignment on Create Enabled
- Partner Account: Automatic Assignment on Update Enabled

The default setting for each of these options is Yes.

Partner account automatic assignment for import does not require a profile option.

Batch Assignment

After partners are imported, partner accounts created in an import batch can be assigned using batch assignment view criteria. After territories are realigned, partner accounts that are affected by the realignment are reassigned.
Note: This reassignment doesn’t include any partner accounts in the manual exclusions defined within the territory.

During the initial implementation, partner accounts can be created before any territories have been set up in the system (for example, as part of a migration). These accounts don’t receive a territory assignment because no territories exist yet. They must be explicitly assigned after territories are created. In this case, it’s recommended that you run a batch assignment using the view criteria "PartnersImportedInABatchNeedingReassignment" to assign these accounts to territories.

Note: If the Automatic Assignment Profile options are set to No, the partners must be assigned using a batch or manual process.

Manual Assignment

For manual assignment, use the Assign Territories action available in the Partner Account Team node. You must have the Partner Maintenance Duty for the partner to use this action.

Clicking the action invokes the Assignment Manager Engine, returning a list of territories matching the partner. You can save this list and make the assignment, or cancel and make no changes to the existing assigned territories.

Partner Territory Assignment: Worked Example

This topic explains how to assign partner territories.

You can assign partner territories with the following methods:

- Batch assignment
- Manual assignment

Note: A third method of partner territory assignment exists. This assignment type, called Immediate Assignment, occurs automatically when partner accounts are created or updated if the profile options Partner Account Automatic Assignment on Create Enabled and Partner Account Automatic Assignment on Update Enabled are set to Yes. Yes is the default setting for these values.

Assigning Partner Territories Using the Batch Assignment Process

1. Sign in to Oracle Sales Cloud.
2. From the Tools area in Navigator, select Scheduled Processes.
4. On the Schedule New Process dialog box, click the drop-down arrow next to Name and then click the Search link.
5. On the Search and Select: Name dialog, enter Assign in the Name field and click Search.
6. Select Assign Territories to Partner Account from the returned list and click OK.
7. Click OK on the Schedule New Process dialog.
8. On the Process Details page, enter View Criteria Name and View Criteria Bind Values, then click Submit.
9. The Scheduled Processes page appears. Notice that the Status is Scheduled. You can click the Log link at the bottom of the page to see the log.

Assigning Partner Territories Using the Manual Assignment Process

1. Sign in to Oracle Sales Cloud.
2. From the Partner Management area in Navigator, select Partners.
3. Select a partner from the partner list.
4. On the left side under Partner Information, click the Partner Account Team link.
5. Click Actions in the upper right corner, and select Assign Territories.
6. The Assignment Manager appears, displaying a list of assigned territories.
7. Click Save or Save and Close to save the assignments. If you don’t want to save the assignments, click Cancel.

Manually Assigning Partners and Partner Sales Credits in Opportunities: Explained

Much like any other internal resource, you can manually add or remove partners to or from the opportunity team. You also can assign nonrevenue sales credit to partners in opportunities. Partner assignment and sales credit allocation follow specific rules.

Partner Assignment to Opportunities

Note the following behavior for partner assignment to opportunities:

- Partner resources cannot be removed from the opportunity team if they are receiving nonrevenue credit on the opportunity. To remove a partner, you must first remove the credit allocations he is assigned.
- When a partner organization is removed from the opportunity, and no resource from that partner organization is receiving sales credit on the opportunity, all partner resources, if they exist, are automatically removed from the opportunity team.
- Territories of type Partner or Partner Program are not assigned to opportunities.
- The resources list of values only displays partner resources whose partner organization is already associated with the opportunity.

Sales Credits and Partners

Note the following behavior for partners receiving sales credit:

- Partner resources are only eligible to receive nonrevenue credit on opportunity revenue.
- When selecting sales credits for partner resources, only partner resources whose partner organization is associated with the revenue line are eligible for sales credits.
- Partner resources are not eligible for deal protection.

Related Topics

- Managing Partner Opportunities: Overview
- Partner Lead Attributes in Opportunities: Explained

Assignment Scheduled Processes

Assignment Processes for Opportunities: Points to Consider

Two processes are involved in opportunity assignment. You use one for territory-based assignment and one for rule-based assignment.
The two opportunity assignment processes related to assignment are:

- **Revenue Territory Territory Based Assignment Process**: Run this process if you are using territory-based assignment.
- **Opportunity Resource Rule Based Assignment Process**: Run this process if you are using rule-based assignment.

**Note**: You run processes from the *Scheduled Processes* page, available from the navigator. You must have the role of Sales Administrator or a setup user to run scheduled processes.

When setting up the processes, you must enter specific **View Criteria** names and their **Bind Values**. The following sections list the parameters to use and some examples.

**Revenue Territory Territory-Based Assignment Process Parameters**

The following table identifies the view criteria and view criteria bind values available for the opportunity revenue territory territory-based assignment process.

<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>Bind Values</th>
</tr>
</thead>
</table>
| OpenOpportunities ByCreationDate | Revenue lines of open opportunities created in the last 90 days. Note: The view criteria bind values do not need to be entered for the default date range, 90 days. You can pass a different date range by entering View Criteria Bind Values. | • BindOptyCreationDateTo= [date], BindOptyCreationDateFrom= [sysdate-90]  
• For example: BindOptyCreationDateTo= 2015-02-29, BindOptyCreationDateFrom= 2015-01-01  
• For example: BindOptyCreationDateFrom= 2015-01-01, BindOptyCreationDateTo= 2015-02-29 |
| OpenOpportunities ByEffectiveDate | Revenue lines of open opportunities that have an expected close date in the last 90 days. Optionally, the user can enter a different date range. | • BindEffectiveDateFrom= [sysdate], BindEffectiveDateTo= [sysdate [90]]  
• For example: BindEffectiveDateFrom= 2015-01-01, BindEffectiveDateTo= 2015-02-29 |
| SalesAccountUpdated InLastNDays | Revenue lines of all open opportunities whose sales account was updated in the last 30 days. Optionally, the user can enter a different number of days. | • BindSalesAccountUpdatedSince= [30]  
• For example, opportunities whose sales account was updated in last 15 days: BindSalesAccountUpdatedSince=15 |
| OpenOpportunitiesUpdated InLastNDays | Revenue lines of all open opportunities updated in the last 30 days. Optionally, the user can enter a different number of days. | • BindOptyUpdatedSince= [30]  
• For example, open opportunities updated in last 15 days: BindOptyUpdatedSince=15 |
| FilterByBatchTag | Revenue lines of all open opportunities that contain a specific value in the Batch Tag field. | • BindBatchTag= [text]  
• For example, open opportunities that have EMEA in the Batch Tag field: BindBatchTag=EMEA |
| RevenueImportCriteria | Revenue lines of all opportunities imported through the given bulk import batch ID. | • BindBatchId  
• For example: BindBatchId=5618782 |
<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>ClosedOpportunitiesByCreationDate</td>
<td>Revenue lines of closed opportunities created in the last 90 days. Optionally, the user can enter a different date range.</td>
<td>• BindOptyCreationDateTo = [date], BindOptyCreationDateFrom = [sysdate-90]</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For example: BindOptyCreationDateTo = 2015-02-29, BindOptyCreationDateFrom = 2015-01-01</td>
</tr>
<tr>
<td>ClosedOpportunitiesByEffectiveDate</td>
<td>Revenue lines of opportunities closed in the last 90 days. Optionally, the user can enter a different date range.</td>
<td>• BindEffectiveDateFrom = [sysdate], BindEffectiveDateTo = [sysdate + 90]</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For example: BindEffectiveDateFrom = 2015-01-01, BindEffectiveDateTo = 2015-02-29</td>
</tr>
<tr>
<td>FilterByOptyNumber</td>
<td>Revenue lines of an opportunity with a specific number.</td>
<td>• BindOptyNumber = &lt;XYZ&gt;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• BindOptyNumber = 17001</td>
</tr>
</tbody>
</table>

### Rule-Based Assignment Process Parameters

The following table identifies the view criteria and view criteria bind values available for the opportunity resource rule-based assignment process.

<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>OpenOpportunitiesUpdatedInLastNDays</td>
<td>All open opportunities which were updated in the last 30 days. Optionally, the user can enter a different number of days.</td>
<td>• BindOptyUpdatedSince = [30]</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For example, opportunities updated in last 15 days: BindOptyUpdatedSince = 15</td>
</tr>
<tr>
<td>OpportunityForImportBatchVO</td>
<td>All opportunities imported through the given bulk import batch ID. Value for BatchId is mandatory.</td>
<td>• BindBatchId</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For example: BindBatchId = 5618782</td>
</tr>
<tr>
<td>OpenOpportunitiesByCreationDate</td>
<td>Open Opportunities created in the last 90 days. Optionally, the user can pass a different date range.</td>
<td>• BindOptyCreationDateTo = [sysdate], BindOptyCreationDateFrom [sysdate + 90]</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For example: BindOptyCreationDateTo = 2015-02-29, BindOptyCreationDateFrom = 2015-01-01 or BindOptyCreationDateFrom = 2015-01-01 This second example will process all open Opportunities that were created between January 1, 2015 and the current date.</td>
</tr>
<tr>
<td>OpenOpportunitiesByEffectiveDate</td>
<td>Open opportunities that have an expected close date in the last 90 days. Optionally, the user can pass a different date range.</td>
<td>• BindEffectiveDateFrom = [sysdate], BindEffectiveDateTo = [sysdate + 90]</td>
</tr>
</tbody>
</table>
Oracle Sales Cloud
Implementing Sales

Chapter 8
Setting Up Work Assignment

### View Criteria Name
<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>SalesAccountUpdated InLastNDays</td>
<td>All open opportunities whose sales account got updated in the last 30 days. Optionally, the user can pass a different number of days.</td>
<td>• For example: BindSalesAccountUpdated Since [30]</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For example, opportunities whose sales account was updated in last 15 days: BindSalesAccount UpdatedSince=15</td>
</tr>
<tr>
<td>ClosedOpportunities ByEffectiveDate</td>
<td>Opportunities closed in the last 90 days. Optionally, the user can pass a different date range.</td>
<td>• BindEffectiveDateFrom [sysdate], BindEffective DateTo [sysdate-90]</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For example: BindEffective DateFrom=2015-01-01, BindEffective DateTo=2015-02-29</td>
</tr>
<tr>
<td>ClosedOpportunities ByCreationDate</td>
<td>Closed opportunities created in the last 90 days. Optionally the user can pass a different date range.</td>
<td>• BindOptyCreationDateTo [sysdate], BindOptyCreation DateFrom [sysdate-90]</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• For example: BindEffective DateFrom=2015-01-01, BindEffective DateTo=2015-02-29</td>
</tr>
<tr>
<td>FilterByOptyNumber</td>
<td>Revenue lines of an opportunity with a specific number.</td>
<td>• BindOptyNumber=&lt;XYZ&gt;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• BindOptyNumber=17001</td>
</tr>
</tbody>
</table>

### Opportunity Assignment Implementation Considerations

Consider the following points when scheduling opportunity batch assignment processes:

- Multiple Revenue Territory Territory Based Assignment and Opportunity Resource Rule Based Assignment processes cannot run at the same time. If one of the processes is running and you submit another process (either Revenue Territory Territory Based Assignment or Opportunity Resource Rule Based Assignment), then the second process have a Paused status until the first job completes. Once the first process completes, the second process will start.
- For date-based view criteria, for example, OpenOpportunitiesByEffectiveDate, the view criteria bind values do not need to be entered if the default date range is used.
- For number-of-days-based view criteria, for example, OpenOpportunitiesUpdatedInLastNDays, the view criteria bind values do not need to be entered if the default number of days is used.
- When entering view criteria bind values the date format is YYYY-MM-DD.
- When scheduling opportunity batch assignment processes for the first time, if a process errors, you can try rescheduling the process and entering a lower value for the Maximum Sub Processes per Process parameter. The default value is 10. This ensures that each batch contains a small number of opportunities or revenue lines. If there is an issue with one of the opportunities or revenue lines, then the appropriate subprocess will an error status and the other subprocesses will complete successfully.

For more information on opportunity assignment, see the help. Use keywords "assignment", "territory-based assignment", and "rule-based assignment".
Running Territory Assignment Process for Opportunities: Procedures

The batch process, Revenue Territory Territory Based Assignment, evaluates opportunity revenue lines and matches eligible territories and their salespeople to the revenue lines. Use the following procedures to run the process and monitor its success.

Prerequisites

Following are the prerequisites to successfully assign resources to opportunities using this process:

- The organization hierarchy exists with valid resources.
- Live territories exist.
- Open opportunities exist with open revenue lines.
- Territory attributes match attributes of open opportunity revenue lines.
- The profile option, Opportunity Assignment Mode, is set to either Territory-Based Only or Both (not Rule-Based Assignment).
- You run the process as a user with the Sales Administrator job role.

Finding the Process

Find the process as follows:

1. Sign in as the sales administrator and navigate to Scheduled Processes.
3. In the Schedule New Process window, click the drop-down list next to the Name field and click Search.
4. In the Search dialog, enter the first three letters of the process name, Rev, and click Search. Note that the search is case sensitive.

5. Select the process name in the results that are returned and click Ok.

6. Click Ok again, if needed.

7. The Process Details window appears, where you will enter parameters using the steps in the following section, Entering Process Parameters.

Entering Process Parameters

Enter the process parameters in the Parameters tab of the Process Details window. The process parameters are called "view criteria" in the UI.
Since there are many different options when setting up the view criteria, here we are going to use a simple view based on opportunity creation date. When entering the data, remember that the values are case sensitive, and no spaces are used.

1. In the **View Criteria Name** field, enter *OpenOpportunitiesByCreationDate*.

2. In the **View Criteria Bind Values** field, enter *BindOptyCreationDateFrom=2014-01-01*. This value captures all open opportunities created since January 1, 2014. The format must be yyyy-mm-dd.
   - To specify a date range, enter *BindOptyCreationDateFrom=<date>, BindOptyCreationDateTo=<date>*. Note the From and To values are separated by a comma.
   - Leave the field blank to capture opportunities in the default date range, the past 90 days.

3. For the purposes of this example, leave the remaining fields at their default values.
4. Next, you schedule the process to run, as described in the following section, Scheduling the Process.

**Note:** You can find more information on the process parameters in the help. Use keywords "Revenue Territory Territory Based Assignment Process". Or, you can use article 1507365.1, available on MyOracle Support (http://support.oracle.com), which also describes the parameters.
Scheduling the Process

Set the process to run either on a schedule or immediately in the **Schedule** tab of the Process Details window (available under Advanced options).

1. Click the **Advanced** button in the Process Details window.
2. Click the **Schedule** tab.
3. You can run the process on a schedule using the **Using a schedule** option and entering the schedule information. However, for the purposes of this example, we are going to run the process immediately. Click the **As soon as possible** option.
4. Click **Submit**.
5. If the process submitted successfully, a confirmation message appears with the request number (process ID). Make note of this ID to use it in the next step, Viewing Details of the Process Submission. Click **Ok** on the confirmation message dialog.

Viewing Details of the Process Submission

You can view details of the process submission, to make sure it ran without errors and to see how many records were processed.

1. Back in the Scheduled Processes page, enter the process name, Revenue Territory Territory Based Assignment Process, in the **Name** field and click **Search**.
   - Alternatively, you can enter the process ID in the **Process ID** field and click **Search**.
2. In the search results that are returned, click on the job name to view details of the submission. The submission details include such information as:
   - Start date and time
   - Whether the job completed successfully
   - Parameters used in the job
   - Log file containing additional details like the number of work objects processed successfully or with errors and any error messages if the job was not successful

Scheduling Account Assignment: Explained

The Request Account Assignments process can be scheduled and run on the Scheduled Processes page. You need to have the 'Run Sales Party Batch Assignment' privilege to be able to define and run account batch assignment.

To access the Scheduled Processes page, click **Navigator**. Under the **Tools** heading, click **Scheduled Processes**.

1. Click **Schedule New Process** then click type **Job**. Choose the process named **Request Account Assignments**. If needed, use the Search link at the bottom of the Search window.
2. Enter your process details. The following table shows the view criteria and its description, as well as any bind values that are required.
   - **Work Object code**: SalesAccount_Work_Object
   - **Candidate Object Code**: SalesAccountTerritory_Candidate_Object
   - **Assignment Mode**: Territory
   - **View Criteria Name**: (see table below)
### View Criteria Bind Values: (see table below)

<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>SalesAccountsUpdatedSinceVC</td>
<td>Use this view criteria to assign accounts which have not been previously assigned and have LAST_UPDATED_DATE (in the ZCA_SALES_ACCOUNTS table) greater than the specified date. For newly created accounts, LAST_UPDATE_DATE is the same as the creation date.</td>
<td>BindLastUpdateDate= [YYYY-MM-DD HH:MM:SS]</td>
</tr>
<tr>
<td>SalesAccountsAssignedBeforeVC</td>
<td>Use this view criteria to reassign accounts which have been previously assigned and have LAST_ASSIGNED_DATE (in the ZCA_SALES_ACCOUNTS table) less than the specified date.</td>
<td>BindLastAssignedDate= [YYYY-MM-DD]</td>
</tr>
<tr>
<td>SalesAccountTerritoryBatchReassignmentVC</td>
<td>Use this view criteria to reassign accounts impacted by the specified territory and territory dimensional realignment batch.</td>
<td>BindReassignment BatchId= [Territory Reassignment Batch ID]</td>
</tr>
<tr>
<td></td>
<td>This view criteria is also used internally to initiate immediate/automatic assignments after territory proposal activation and territory dimension updates.</td>
<td></td>
</tr>
<tr>
<td>SalesAccountBulkImportVC</td>
<td>Use this view criteria to assign accounts created in a given customer import batch.</td>
<td>BindReassignment BatchId= [Import Activity ID]</td>
</tr>
<tr>
<td></td>
<td>This view criteria is also used internally to initiate immediate/automatic assignments after customer import.</td>
<td></td>
</tr>
<tr>
<td>SalesAccountDimsForPartyVC</td>
<td>Use this view criteria to assign the account with the specified account ID.</td>
<td>BindPartyId= [Sales Account ID]</td>
</tr>
</tbody>
</table>

3. Define a schedule as needed using the **Advanced** button on the Process Details page. You can schedule the process to run as soon as possible, or to run at a given frequency and start date.

4. Submit your job and monitor it using the Scheduled Processes list, refreshing it to view the latest status updates.

For details on the available process parameters, see the Account Assignment Process Parameters (1522206.1) document on support.oracle.com.

### Candidate Refresh: Explained

Candidate data, such as resources, are loaded into a cache and used for each assignment request. Rule-based assignment requests that identify matching candidates or scores for matching candidates use candidate data. The candidate data cache can be refreshed at regular intervals using the Publish Assignment Information and Refresh Candidate Cache process scheduled in the Enterprise Scheduling Service (ESS). This process marks the candidate for refresh, and the candidate data is refreshed the next time there is an assignment request using that candidate.
Note: This feature affects rule-based assignment using the rule set types of matching candidates or matching candidates with scoring only.

You may schedule this process daily, weekly, and so on, based on the frequency of changes to the candidates. Consider how often the candidate data will change and how critical it is to have the changes available for use in assignment. For example, resource details may change daily and therefore the resource candidate data cache for managing leads may need to be updated once every day.

The refresh cache process has the following parameters that you must enter:

<table>
<thead>
<tr>
<th>Candidate Object</th>
<th>Owner Module</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource_Candidate_Object</td>
<td>Sales</td>
</tr>
<tr>
<td>Resource_Candidate_Object_Lead</td>
<td>leadMgmt</td>
</tr>
<tr>
<td>ORA_Deal_Resource_Candidate_Object</td>
<td>leadMgmt</td>
</tr>
<tr>
<td>ORA_Queue_Candidate_Object</td>
<td>svcMgmt</td>
</tr>
</tbody>
</table>

Note: Do Not enter or select values for the Application and Publish parameters if you want to run the refresh cache process.

For example, there would be one ESS process scheduled for managing leads with the parameter Resource_Candidate_Object_Lead/leadMgmt. Sales would need a process scheduled with the parameter Resource_Candidate_Object/sales.

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:
### Input Parameter | Description
---|---
Parent Process ID | The identifiers of parent ESS processes. You can enter multiple process IDs.
From Date | Select the start date.
To Date | Select the end date.
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>
</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.</td>
</tr>
</tbody>
</table>
Example Report

The following is an example of a batch assignment error report:

Process Summary

<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></td>
</tr>
<tr>
<td>1728224</td>
<td>Error</td>
<td>225030 MOW_AMENG_A0_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 processes 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.

Running Opportunity 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 opportunity batch assignment in diagnostic mode.

Running Batch Assignment

A sales representative of a company has to follow up on an opportunity, but the opportunity has not been assigned to his territory. He has requested that you, the sales administrator, investigate the details of territory assignment. You can provide these details by running opportunity batch assignment in diagnostic mode.

1. Sign in to the application, select Navigator, and then select Scheduled Processes.
2. Click Schedule New Process.
3. On the Schedule New Process page, click the Name drop-down list, and click Search.
4. On the Search and Select: Name dialog box, search for the Revenue Territory Territory Based Assignment process.
5. Select the Revenue Territory Territory Based Assignment process, and click OK.
6. On the Schedule New Process page, click OK.
7. On the Process Details page, enter the following parameter values:
Parameter | Value
--- | ---
View Criteria Name | FilterByOptyNumber
View Criteria Bind Values | BindOptyNumber = XXX where XXX is the opportunity number
Diagnostic Mode | Select the check box.

8. Click **Submit**.
9. Note down the process ID.
10. Close the page and search for the process using the process ID.
11. Open the log file in another browser 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 file to review information on the assignment processing, the matching territories found, matching territories that were dropped because they were parent territories, and the final territories assigned.

Running Account 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 account batch assignment in diagnostic mode.

Running Batch Assignment

A sales representative of a company is due to meet with a new account he is now responsible for, but the account has not been assigned to his territory. He has requested that you, the sales administrator, investigate the details of territory assignment. You can provide these details by running account batch assignment in diagnostic mode.

1. Sign in to the application, select **Navigator**, and then select **Scheduled Processes**.
2. Click **Schedule New Process**.
3. On the Schedule New Process page, click the **Name** drop-down list, and click **Search**.
4. On the Search and Select: Name dialog box, search for the Request Account Assignments process.
5. Select the **Request Account Assignments** process, and click **OK**.
6. On the Schedule New Process page, click **OK**.
7. On the Process Details page, enter the following parameter values:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Object Code</td>
<td>SalesAccount__Work_Object</td>
</tr>
<tr>
<td>Candidate Object Code</td>
<td>SalesAccountTerritory__Candidate__Object</td>
</tr>
<tr>
<td>Assignment Mode</td>
<td>Territory</td>
</tr>
<tr>
<td>View Criteria Name</td>
<td>RegistryIDVC</td>
</tr>
</tbody>
</table>
Implementing Sales

Chapter 8

Setting Up Work Assignment

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Criteria Bind Values</td>
<td>RegistryIDs= XXX where XXX is the party number (also known as registry ID)</td>
</tr>
<tr>
<td>Diagnostic Mode</td>
<td>Select the check box.</td>
</tr>
</tbody>
</table>

8. Click **Submit**.
9. Note down the process ID.
10. Close the page and search for the process using the process ID.
11. Open the log file in another browser 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 file to review information on the assignment processing, the matching territories found, matching territories that were dropped because they were parent territories, and the final territories assigned.

Running Partner Account 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 partner batch assignment in diagnostic mode.

Running Batch Assignment

A channel account manager of a company is due to meet with a partner account he is now responsible for, but the partner account has not been assigned to his territory. He has requested that you, the sales administrator, investigate the details of territory assignment. You can provide these details by running partner account batch assignment in diagnostic mode.

1. Sign in to the application, select **Navigator**, and then select **Scheduled Processes**.
2. Click **Schedule New Process**.
3. On the Schedule New Process page, click the **Name** drop-down list, and click **Search**.
4. On the Search and Select: Name dialog box, search for the Assign Territories to Partner Account process.
5. Select the **Assign Territories to Partner Account** process, and click **OK**.
6. On the Schedule New Process page, click **OK**.
7. On the Process Details page, enter the following parameter values:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Criteria Name</td>
<td>QueryByCompanyName</td>
</tr>
<tr>
<td>View Criteria Bind Values</td>
<td>BindCompanyName= XXX where XXX is the partner number</td>
</tr>
<tr>
<td>Diagnostic Mode</td>
<td>Select the check box.</td>
</tr>
</tbody>
</table>

8. Click **Submit**.
9. Note down the process ID.
10. Close the page and search for the process using the process ID.
11. Open the log file in another browser 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 file to review information on the assignment processing, the matching territories found, matching territories that were dropped because they were parent territories, and the final territories assigned.

### 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 MOW_ DIAG_ MODE_ WO_ LIMIT profile option. The default setting is 1.</td>
</tr>
<tr>
<td>Work Object Code= Lead_Work_Object_Lead</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>Candidate Object Code = Territory_Candidate_Object_Lead</td>
<td>• The process has started.</td>
</tr>
<tr>
<td>Assignment Mode = Territory</td>
<td>• Work object being processed and the candidates being found.</td>
</tr>
<tr>
<td>View Criteria Name = LeadAssignmentDiagnosticVC</td>
<td>• Type of assignment processing:</td>
</tr>
<tr>
<td>View Criteria Bind Values = BindLeadNumberDiag= 108970</td>
<td>o Territory is territory assignment</td>
</tr>
<tr>
<td>Rule Category ID =</td>
<td>o Matching is assignment using rules</td>
</tr>
<tr>
<td>Rule Category Name = ORA_Sales_Lead_Territory_Rule_Category</td>
<td>o Score is scoring</td>
</tr>
<tr>
<td>Grouping Attribute =</td>
<td>o 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
--- | ---
Replace Team = true | Provides a summary of the active assignment attributes and their values that will be used in the processing of this lead.
Number of Work Objects per Sub Process = 1000 | 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.
Maximum Sub Processes per Process = 10 | - Values for the work object.
Metric Logging Interval = 0 | - Attributes that are null.
Custom Data = | - Attributes that indicate the type of lead being processed. For example, Sales Account Indicator = Y
Diagnostic Mode = true | Use this information to confirm the data values for the work object that may be used in the assignment processing.

Matching request for work object Lead_Work_Object_Lead with the identifier 108970 and candidate object Territory_Candidate_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
Auxiliary Classification Code 2 = OFN1
Auxiliary Classification Code 3 = LANG-12113
## Example Log File Entries

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Industry Classification Code = 2900</td>
</tr>
<tr>
<td>Auxiliary Classification Code 1 = CORPORATION</td>
</tr>
<tr>
<td>Named Sales Account = Y</td>
</tr>
<tr>
<td>Score = null</td>
</tr>
</tbody>
</table>

Assignment matching using mapping set Mapping Set 1 is in process. (MOW-225185)

Assignment mapping values were retrieved. (MOW-225211)

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)

Function Code = AcTyp, Translated values = (1,1)

Function Code = Geo, Translated values = (1, United States), (999984000001036, Pacific), (999984000001009, West)

This section is relevant for Oracle Support to troubleshoot assignment issues.
### Example Log File Entries

<table>
<thead>
<tr>
<th>Description</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Function Code = Prod, Translated values = (1, 999999999999999)</td>
<td></td>
</tr>
<tr>
<td>Function Code = OrgTp, Translated values = (77,77)</td>
<td></td>
</tr>
<tr>
<td>Candidate matches were identified. Post processing is in progress. (MOW-225210)</td>
<td></td>
</tr>
<tr>
<td>The territory with the attribute name Territory Number and attribute value 5377182 was deleted because it is a parent. (MOW-225209)</td>
<td></td>
</tr>
<tr>
<td>The territory with the attribute name Territory Number and attribute value 282312 was deleted because of an exclusion. (MOW-225208)</td>
<td></td>
</tr>
<tr>
<td>The final matching candidates for mapping set Mapping Set 1 were identified. (MOW-225207)</td>
<td></td>
</tr>
<tr>
<td>Territory Number = 83, Territory ID = 100000013157305</td>
<td></td>
</tr>
<tr>
<td>Territory Number = 473, Territory ID = 100000013157417</td>
<td></td>
</tr>
<tr>
<td>Territory Number = 69095, Territory ID = 100100051383477</td>
<td></td>
</tr>
<tr>
<td>Territory Number = 496, Territory ID = 300100003212620</td>
<td></td>
</tr>
<tr>
<td>Territory Number = 95, Territory ID = 300100003282208</td>
<td></td>
</tr>
<tr>
<td>Territory Number = 45, Territory ID = 300100004466888</td>
<td></td>
</tr>
<tr>
<td>Territory Number = 233, Territory ID = 300100004466906</td>
<td></td>
</tr>
</tbody>
</table>

### Matching Request for Work Object Lead_Work_Object_Lead

- 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)

- Assignment processing using rule set RS12 is in progress. (MOW-225202)

- Candidate matches were identified. Post processing is in progress. (MOW-225210)
### Example Log File Entries

<table>
<thead>
<tr>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>The final matching candidates for rule set RS12 were identified. (MOW-225201)</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>
</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>
</tr>
<tr>
<td>The existing candidates were identified. (MOW-225200)</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>
</tr>
<tr>
<td>Assignment disposition for work object Lead_Work_Object_Lead with the identifier 142802 is complete. (MOW-225166)</td>
</tr>
<tr>
<td>Assignment matching using mapping set Mapping Set 2 is in process. (MOW-225185)</td>
</tr>
</tbody>
</table>

If the lead was previously assigned, this section shows the existing territories as well as shows any territories that no longer match and therefore are going to be removed from the lead.

<table>
<thead>
<tr>
<th>Territory Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>335</td>
</tr>
<tr>
<td>274</td>
</tr>
<tr>
<td>32</td>
</tr>
<tr>
<td>220</td>
</tr>
</tbody>
</table>

Assignment disposition for work object Lead_Work_Object_Lead with the identifier 142802 is complete. (MOW-225166)

The lead assignment post processing has started.

The lead reassign value is set to N and assignment status is set to Assigned as part of lead assignment post processing.

The lead last assignment post processing date and time is set at 2016-08-11 06:31:09.0.

The lead assignment post processing has been completed.

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.

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.
Example Log File Entries | Description
---|---
The mapping set Mapping Set 2 was skipped as the conditional attribute Primary Partner Identifier is blank. (MOW-225206) | Shows the progress of assignment matching for a mapping set.
Assignment matching using mapping set Mapping Set 3 is in process. (MOW-225185) | 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) | Shows the progress of assignment matching for a mapping set.
Assignment matching using mapping set Mapping Set 4 is in process. (MOW-225185) | 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) | Shows the progress of assignment matching for a mapping set.
Assignment matching using mapping set Mapping Set 5 is in process. (MOW-225185) | 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) | Shows the progress of assignment matching for a mapping set.
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>Actions</th>
<th>View</th>
<th>Format</th>
<th>Search</th>
</tr>
</thead>
</table>

**Basic Information**

<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>ChannelS</td>
<td>CDRM_25...</td>
</tr>
<tr>
<td>AutoTerr9774254450</td>
<td>ChannelS</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**.

![Diagnostic Dashboard]

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

Test Name: Test for Data Used by Assignment Manager
Edit Input Set:

<table>
<thead>
<tr>
<th>Value Required</th>
<th>Display Name</th>
<th>Include</th>
<th>New Value</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>Territory Numbers</td>
<td>✓</td>
<td>CDRM_300, CDRM_123, CDRM_43</td>
<td></td>
</tr>
</tbody>
</table>

**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

Run Options ▼ View ▼ Run Name ▼ Run ▼ Clear ▼ Detach

<table>
<thead>
<tr>
<th>Test Name</th>
<th>Prerequisites Details</th>
<th>Input Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓ Test for Data Used by Assignment Manager</td>
<td>No</td>
<td>(Run Failed)</td>
</tr>
</tbody>
</table>

**Columns Hidden** 1

10. On the Test Run Submitted dialog box, click **OK**.
11. Click the Report icon on the relevant report row.

For further assistance with troubleshooting, share the report with Oracle Support, along with the assignment diagnostic log files.

12. Review the report details.

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_ASGN_JOBS and MOW_BATCH_ASGN_JOB_ITEMS. When the size of the batch assignment process is huge, it creates a large number of rows in the MOW_BATCH_ASGN_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.

**Territory Dimension Data Report: Explained**

The territory dimension data report identifies the volume of territory data for each territory dimension and coverage type. You can use information from this report to determine the sequence for each assignment mapping and optimize assignment performance. You must run this report only after you have created and activated your production territories.

Access the Diagnostic Dashboard to generate the territory dimension data report. The report contains one table that shows the number of de-normalized customer account-centric and partner-centric territory records for each territory dimension and coverage type.

The table below shows an example of a territory dimension data report:

<table>
<thead>
<tr>
<th>Function Code</th>
<th>Count for INCLUSION</th>
<th>Count for EXCLUSION</th>
<th>Count for PARTNER_REGULAR</th>
<th>Count for REGULAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>AcTyp</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>305</td>
</tr>
<tr>
<td>Acct</td>
<td>0</td>
<td>0</td>
<td>16</td>
<td>313</td>
</tr>
<tr>
<td>Aux1</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
</tr>
<tr>
<td>Aux2</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
</tr>
<tr>
<td>Aux3</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
</tr>
<tr>
<td>CSize</td>
<td>7</td>
<td>3</td>
<td>13</td>
<td>336</td>
</tr>
<tr>
<td>Geo</td>
<td>7</td>
<td>3</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Indst</td>
<td>7</td>
<td>3</td>
<td>14</td>
<td>268</td>
</tr>
<tr>
<td>OrgTp</td>
<td>7</td>
<td>3</td>
<td>14</td>
<td>374</td>
</tr>
<tr>
<td>Prod</td>
<td>2</td>
<td>3</td>
<td>16</td>
<td>171</td>
</tr>
<tr>
<td>Prtnr</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
</tr>
<tr>
<td>Schnl</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>259</td>
</tr>
</tbody>
</table>
Once the report is generated, you must identify the sequence of mappings as follows:

1. Copy the report over to an excel spreadsheet.
2. Sum up the count for inclusion, exclusion, partner_regular, and regular for each function code.
3. List the function codes in order from lowest total count to highest.

After you list function codes from lowest count to the highest, the report table should look like the following:

<table>
<thead>
<tr>
<th>Function Code</th>
<th>Count for INCLUSION</th>
<th>Count for EXCLUSION</th>
<th>Count for PARTNER_REGULAR</th>
<th>Count for REGULAR</th>
<th>Total Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geo</td>
<td>7</td>
<td>3</td>
<td>2</td>
<td>4</td>
<td>16</td>
</tr>
<tr>
<td>Prod</td>
<td>2</td>
<td>3</td>
<td>16</td>
<td>171</td>
<td>192</td>
</tr>
<tr>
<td>Schnl</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>259</td>
<td>285</td>
</tr>
<tr>
<td>Indst</td>
<td>7</td>
<td>3</td>
<td>14</td>
<td>268</td>
<td>292</td>
</tr>
<tr>
<td>Acct</td>
<td>0</td>
<td>0</td>
<td>16</td>
<td>313</td>
<td>329</td>
</tr>
<tr>
<td>AcTyp</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>305</td>
<td>331</td>
</tr>
<tr>
<td>CSize</td>
<td>7</td>
<td>3</td>
<td>13</td>
<td>336</td>
<td>359</td>
</tr>
<tr>
<td>OrgTp</td>
<td>7</td>
<td>3</td>
<td>14</td>
<td>374</td>
<td>398</td>
</tr>
<tr>
<td>Aux1</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
<td>411</td>
</tr>
<tr>
<td>Aux2</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
<td>411</td>
</tr>
<tr>
<td>Aux3</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
<td>411</td>
</tr>
<tr>
<td>Prtnr</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
<td>411</td>
</tr>
</tbody>
</table>

With this information, you can now update the sequence for each assignment mapping. The function code with the lowest total count, Geo in this example, should be updated to have the sequence 1. The next lowest total count, Prod in this example, should have sequence 2, and so on. You must update the sequence similarly for every mapping in each mapping set, for every work-object and candidate-object combination.


9 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>
</tbody>
</table>
Chapter 9
Setting Up Multiple Currencies

<table>
<thead>
<tr>
<th>Step</th>
<th>Optional or Required</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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: 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.

   The Manage Administrator Profile Values page appears.

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.  
• 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. |
### Oracle Sales Cloud
Implementing Sales

**Chapter 9**

**Setting Up Multiple Currencies**

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<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 &quot;Start Batch Job Time Stamp&quot;. 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>
</table>
| • CRM_CURRENCY_CODE     | 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. | CRM_CURRENCY_CODE and CRM_CONVERSION_RATE_TYPE are updated based on a parameter to the batch program. If these two parameters are passed in, the program uses them to update the revenue tables. If these values are not passed in, the application retrieves the profile option values and updates the revenue tables with them. |
| • CONVERSION_RATE_TYPE  | These attributes store the exchange rate between revenue line currency and the summary revenue (opportunity level) currency and are used to convert the revenue line amounts to opportunity level currency. For lines in a status category of Open, these  
  • 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 |
| • CONVERSION_RATE       | Entered currency. Not updated. | |

---

**REVN_AMT_CURCY_CODE**

Currency of the revenue (summary or line)

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**ORACLE**

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218
<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>
<tr>
<td></td>
<td>• REVN_AMT</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• DOWNSIDE_AMT</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• UPSIDE_AMT</td>
<td></td>
</tr>
<tr>
<td></td>
<td>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.</td>
<td>• Line revenue is not updated.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Summary revenue is recalculated.</td>
</tr>
</tbody>
</table>

| LAST_UPDATE_DATE         | WHO column                      | Updated.        |
| 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

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
Chapter 10

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 the 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

## 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.
   b. Click Schedule New Process.
      The Schedule New Process window appears.
   c. Make sure the Job option is selected.
   d. Enter optimize database search in the Name field and press Return.
      The Schedule New Processes window displays the process name.
   e. In the Schedule New Processes window, click OK.
      The Process Details window appears.
2. Click Advanced.
3. On the Schedule tab, select the Using a schedule option.
4. Select a frequency.
5. Enter an end date in the far future.
6. Click Submit.

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.</td>
<td>2</td>
</tr>
<tr>
<td></td>
<td>If your data volume is low, you can decrease the minimum number of characters required for search to 1.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>If performance is an issue, you can improve search performance by increasing the minimum number of characters required for search to 3.</td>
<td></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_FND_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**.
   - The application displays the profile option information.
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.

- 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>Oracel</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.
11 Setting Up Accounts and Contacts

Customer Data Management: 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.

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.

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.
This figure illustrates the Configure Subtabs dialog that appears when you click the reorder subtabs icon.

6. 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?**

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.
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. When creating an account, the application shows a list of potential duplicate accounts based only on the data quality configuration.</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
- classifications
- assessments

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:

- **HostName** with the value `{host}:{port}/start.swe`.
- **SSLEnabled** with the value `{true|false}`.
- **UserName** with the value `User1`.
- **Password** with the value `password`.
- **System Name** with the value `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:

```
HostName=#{'{Siebel server path}'}
SSLEnabled=#{'{true|false}'}
UserName=#{'{username}'}
Password=#{'{password}'}
System Name=#{'{reference system name}'}
```

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.

Integration 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 HZ_ORIG_SYS_REFERENCES table, where orig_system is ONESOURCE.
2. Look up based on the Oracle Sales Cloud customer stock symbol, checked if no mapping is found in 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 HZ_ORIG_SYS_REFERENCES table, where orig_system is SIEBEL.

 recebe: 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. See Also: "Web Proxy Configuration" in the chapter "Creating a New Provisioning Plan" of the Oracle Sales Cloud Installation Guide
12 Setting Up Products

Sales Products: Overview

Create and edit sales products that you can then use in your catalog. The sales catalog is the source for product groups and products in leads, opportunities, contracts, and service requests. Revenue entered for product groups and products drives metrics for sales forecasting and salesperson quota.

Sales Products Tasks

As the sales administrator, you can perform the following tasks with sales products:

- Create products, view products, and edit products
- Search for products
- Add images and attachments to products
- Import products and create and update products using Oracle file-based import
- Create and update products using REST or SOAP web services

Integration With Other Oracle Applications

Sales products integrates with other applications to provide additional functionality. The following table provides an overview of sales products integrations with other applications.

<table>
<thead>
<tr>
<th>Functionality</th>
<th>Product</th>
<th>Where to Find More Information</th>
</tr>
</thead>
</table>
| Sales product changes are automatically updated in the product model | Oracle Supply Chain Management (SCM) Cloud | - Oracle SCM Cloud Implementing Product Management guide  
- Oracle SCM Cloud Using Product Master Data Management guide  
- Setting Up Products chapter in the Oracle Sales Cloud Implementing Sales guide |
| Use products in the sales catalog | Oracle Sales Cloud Sales Catalog | - Setting Up Sales Catalogs chapter in the Oracle Sales Cloud Implementing Sales guide  
- Managing Opportunity Products and Revenue chapter in the Oracle Sales Cloud Using Sales guide |
| Use products in leads | Oracle Sales Cloud Leads | - Setting Up Leads chapter in the Oracle Sales Cloud Implementing Sales guide  
- Managing Leads chapter in the Oracle Sales Cloud Using Sales guide |
| Use products in opportunities | Oracle Sales Cloud Opportunities | - Setting Up Opportunity Revenue chapter in the Oracle Sales Cloud - Implementing Sales guide |
Initial Tasks for Sales Products

Getting Started With Sales Products

To get started with Oracle Sales Cloud products, familiarize yourself with the implementation steps and concepts described in this topic.

Implementation Steps for Sales Products

The following table provides the high-level implementation steps for sales products, indicates whether each step is required or optional, and lists where to find more information about each step.

<table>
<thead>
<tr>
<th>Step</th>
<th>Optional or Required</th>
<th>Description</th>
<th>Where to Find More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set up item master organization</td>
<td>Conditionally required</td>
<td>The item master organization contains definitions of items that you can use across one or more item and inventory organizations. Either use the default organization supplied by Oracle or set up a full enterprise structure.</td>
<td>Prerequisite Setups for Sales Products topic</td>
</tr>
<tr>
<td>Set up units of measures (UOMs)</td>
<td>Required</td>
<td>Units of measure (UOMs) are standard definitions for product measurements; therefore, you must set up UOMs.</td>
<td>Prerequisite Setups for Sales Products topic</td>
</tr>
<tr>
<td>Specify item master organization</td>
<td>Required</td>
<td>You must set the profile option, Sales Products Item Organization, to the item master organization the sales products are defined in.</td>
<td>The following topics:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Setting Sales Products Item Master Profile Option: Procedure</td>
</tr>
<tr>
<td>Step</td>
<td>Optional or Required</td>
<td>Description</td>
<td>Where to Find More Information</td>
</tr>
<tr>
<td>------</td>
<td>----------------------</td>
<td>-------------</td>
<td>--------------------------------</td>
</tr>
<tr>
<td>Create and edit products</td>
<td>Required</td>
<td>Use the Sales - Products UI to create and edit the products you sell.</td>
<td>• Item Master Organization: Explained &lt;br&gt; • The section in this topic, Eligible to Sell Attribute &lt;br&gt; • The topic, Working with Sales Products: Procedures</td>
</tr>
<tr>
<td>Set &quot;sellable&quot; attribute on products</td>
<td>Required</td>
<td>When creating products in sales, you must mark the Eligible to Sell attribute in order for consuming sales applications to display the product.</td>
<td></td>
</tr>
<tr>
<td>Set &quot;serviceable&quot; attribute on products</td>
<td>Optional</td>
<td>While creating or editing products, set the Eligible for Service indicator to be able to use the product in the service request application.</td>
<td>• The section in this topic, Eligible for Service Attribute &lt;br&gt; • Oracle Engagement Cloud Implementing Service Request Management guide</td>
</tr>
<tr>
<td>Enhance product display with attachments and images</td>
<td>Optional</td>
<td>Enhance the look and feel of your products in the catalog with attachments and images.</td>
<td>• The section in this topic, Attachments, URLs, and Images &lt;br&gt; • The topic, Working with Sales Products: Procedures</td>
</tr>
<tr>
<td>Add products to the sales catalog</td>
<td>Optional</td>
<td>Add your sales products to the sales catalog hierarchy in order to make them available in opportunities, leads, and contracts.</td>
<td>The topic, Adding Products to the Catalog: Procedure</td>
</tr>
<tr>
<td>Run a scheduled process to make SCM Cloud Product Model items available in Sales Cloud</td>
<td>Optional</td>
<td>Products created in Sales Cloud can be seen in the Oracle Supply Chain Management (SCM) Cloud Product Model, but items created in the Product Model cannot be seen in Sales Cloud, unless you run the scheduled process, Import Sales Products from PIM Data Hub.</td>
<td>The section in this topic, Making Products Created in Product Model Available in Sales</td>
</tr>
<tr>
<td>Modify the list of values for the Product Type lookup type</td>
<td>Optional</td>
<td>You can modify the list of product types that display in the sales UI. Sales products retrieve the list of values for Product Type from the lookup type, OSC_SALES_PRODUCT_TYPE. You can find the lookup type in the Setup and Maintenance task Manage Standard Lookups.</td>
<td>The topic, Lookup Types: Explained</td>
</tr>
<tr>
<td>Step</td>
<td>Optional or Required</td>
<td>Description</td>
<td>Where to Find More Information</td>
</tr>
<tr>
<td>------</td>
<td>----------------------</td>
<td>-------------</td>
<td>--------------------------------</td>
</tr>
</tbody>
</table>
| Understand how Sales Cloud products and the SCM Cloud Product Model fit together | Optional | When you create or update product information in Sales Cloud, the product information is automatically updated in the SCM Cloud Product Model. Keep in mind that certain attributes in Sales Cloud products are named differently and map to different attributes in the SCM Cloud Product Model. For example, in Sales Cloud products, the Number field maps to the Item field in the SCM Cloud Items UI. Similarly, the Name field in Sales Cloud products maps to the Description field in the SCM Cloud Items UI. | The following topics:  
  - Sales Products and SCM Cloud Products: How They Work Together  
  - Working with Sales Products: Procedures  
  The following guides:  
  - Oracle SCM Cloud - Implementing Product Management  
  - Oracle SCM Cloud - Using Product Master Data Management |
| Understand supported item life cycle phases and item classes for sales products | Optional | Keep in mind that sales products support only:  
  - Production life cycle phase  
  - Root item class | The following sections in this topic:  
  - Default Product Life Cycle  
  - Root Item Class  
  The topic, Lifecycle Phases: Explained |
| Understand how the sales products business logic interacts with the Oracle SCM Cloud Product Model | Optional | Sales Cloud products data follows specific business logic that relates to the Oracle SCM Product Model. | The topic, Sales Products Business Object Logic: Explained |
| Display additional details about products using extensible flexfields | Optional | After you set up extensible flexfields and add more details to product, salespeople can browse the catalog and drill down further to view more details about the products. This setup requires a license to Oracle SCM Product Hub. | The article, Extensible Flexfield Data Configuration for Product Information Management (Doc ID 2091164.1), available on My Oracle Support (support.oracle.com). |

**Eligible to Sell Attribute**

The Eligible to Sell attribute marks a product as available in the consuming sales applications. You enable or disable this attribute in the edit product pages. It can also be updated using web services or file-based data import. This attribute interacts with the SCM Cloud item attributes Customer Orders Enabled and Orderable on the Web. Keep in mind the following points about the attribute:

- All sales products must have the indicator set to yes (checked) to be visible in consuming sales applications.
- If a user sets it to no from yes, then the corresponding SCM Cloud item indicators Customer Orders Enabled and Orderable on the Web are set to no.
- If a user sets it to yes from no, then only Customer Orders Enabled is set back to yes.
Note: Keep in mind that after you create a product using the simplified products UI, you cannot delete it. To "hide" products in consuming applications, deselect the Eligible to Sell indicator in the product details screen.

Eligible for Service Attribute
The Eligible for Service attribute makes a product available in the Oracle Engagement Cloud Service Request Management application. You enable or disable this attribute in the edit product pages. It can also be updated using web services or file-based data import. This attribute interacts with the SCM Cloud item attribute Service Request. Keep in mind the following points about the attribute:

- All serviceable products must have the indicator set to yes (checked) to be visible in the service request application.
- If the indicator is set to yes in Sales Cloud product pages, then the Service Request indicator in SCM Cloud changes to Enabled.
- If a user sets it to no from yes in Sales Cloud, then the corresponding SCM Cloud item indicator Service Request is set to null.
- If, in SCM Cloud, a user sets the Service Request indicator to Disabled, Inactive, or Null, then the application clears the Eligible for Service check box in the Sales Cloud products pages.

Attachments, URLs, and Images
You can associate both attachments (which can be files or URLs) and images with products. Note the following:

- Only one image can be associated with a product.
- Multiple attachments (files) or URLs can be associated with a product.

Default Product Life Cycle
Sales Cloud products functionality supports a single product life cycle, called Production. If this default life cycle meets your business requirements, no implementation steps are required around product life cycle.

Root Item Class
By default, Sales Cloud products functionality uses the supplied Root item class to classify products. Additional classifications are only available if you license the product hub.

Making Products Created in Product Model Available in Sales
Products created in Sales Cloud can be seen in the Product Model, but items created in the Product Model cannot be seen in Sales Cloud unless you run the scheduled process, Import Sales Products from PIM Data Hub. You run the process as the sales administrator in the Scheduled Processes pages in Setup and Maintenance work area.

Related Topics
- Item Master Organization: Explained

Prerequisite Setups for Sales Products
Before you set up and use the Oracle Sales Cloud products UI, ensure that your implementation has completed the prerequisite setups discussed in this topic.

Ensure Setup of Enterprise Structure
Sales products functionality relies on the item master organization, the organization that holds the definitions of all products your company plans to sell. If you're implementing a single Sales Cloud instance, and you're relying on the Oracle SCM
Cloud Product Model that comes with Sales Cloud, then the default organization supplied by Oracle is sufficient. In this case, there are no organization setups required. However, if you’re implementing another Oracle cloud service in addition to Sales Cloud or you’re implementing the SCM Product Hub, then your implementation must have the full enterprise structure established. For more information, see the related topics and these guides:

- Oracle Applications Cloud - Understanding Enterprise Structures
- Oracle SCM Cloud - Implementing Product Management
- Oracle SCM Cloud - Using Product Master Data Management

Ensure Setup of Units of Measure

Units of measure (UOMs) are standard definitions for product measurements; therefore, you must set up UOMs. If UOMs are already set up as part of your company’s existing setups, then you can skip this step.

Setting up UOMs involves creating the larger UOM classes (or categories), as well as the UOMs themselves. For example:

- If you’re selling consulting services where you charge by the hour and minute, then you set up Time as the UOM class and Hour and Minute as UOMs.
- If you’re selling goods that are priced by the box and by the unit, you set up Quantity as the UOM class and Box and Each as the UOMs.
- If you’re selling and pricing goods by the meter, then you set up Dimension as the UOM class and Meter as the UOM.

**Note:** Each class can have only one base UOM. Base UOMs should generally be the smallest UOM in the class.

To set up UOM classes and the UOMs themselves:

1. Sign in as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Units of Measure task.
3. If the class for the unit of measure you are creating, does not exist, then:
   a. Click **Manage UOM Classes**.
   b. Click **Add**, the plus sign icon in the Search Results.
   c. Enter the class name and optional description. For example, for quantity, enter **Quantity** as the **Class**.
   d. Enter the smallest unit you are selling for the class as the **Base UOM** and optional description. For example, for Quantity, enter **Each**.
   e. Click **Save and Close**.
4. In the Manage Units of Measure page, click **Add** in the search results area.
5. Enter the name of the UOM and an optional description. For example, enter Each.
6. Select a class from the Class list.

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

7. Click **Save and Close**.

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Tip: When disabling UOMs, disable the conversions first, then the UOM. If the UOM you’re disabling is a base unit, the class should be disabled also. After an item has been defined in the item master, then the primary UOM for that item cannot be modified.

Related Topics
- Item Master Organization: Explained
- Item Organizations: Explained
- Units of Measure, Unit of Measure Classes, and Base Units of Measure: How They Fit Together
- Assigning Base Units of Measure to Unit of Measure Classes: Examples

Setting Sales Products Item Master Profile Option: Procedure

Oracle Sales Cloud products functionality relies on a single item master organization. All products (items) are created within this item master organization. The item master organization contains definitions of items that you can use across one or more item and inventory organizations. For determining item master organization, sales products uses the value defined in the profile option, Sales Products Item Organization (QSC_SALES_PRODUCTS_INVENTORY_ORG_ID).

For more information on setting up inventory organizations and the item master, see the Oracle Applications Cloud topics on defining enterprise structures.

Setting Sales Products Item Organization Profile Option

Use the following procedure to set the Sales Products Item Organization profile option.

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Administrator Profile Values task.
   The Manage Administrator Profile Values page appears.
3. In the Profile Option Display Name field, enter Sales Products Item Organization.
4. Click Search.
5. Click the name of the profile option in the search results.
6. In the Profile Value field, select the organization that serves as the item master for products.
7. Save your changes.

Related Topics
- Item Master Organization: Explained

Working with Sales Products: Procedures

Use the procedures in this topic as you create and maintain Oracle Sales Cloud products.

This topic covers the following tasks:
- Viewing a list of sales products: This task includes searching and filtering.
- Creating products: This task includes entering product basic information.
- Editing products: This task includes modifying some product basic information (including setting sellable and serviceable attributes) and adding or editing attachments, URLs, and images.
After you create products in Oracle Sales Cloud, you can then use them in your sales catalog. See the topic, Adding Products to the Catalog: Procedure, for more information.

**Viewing a List of Products**

To view a list of products, sign in as the sales administrator and navigate to **Sales - Products**.

In the list or summary page, you can:

- Search for products using the **Find** text box. For more information, see the topics on using search.
- Filter the view between:
  - **All Products**: Shows all products, regardless of sellable or serviceable attribute status.
  - **Eligible for Sale**: Shows only products that have the Eligible to Sell attribute enabled.
  - **Eligible for Service**: Shows only products that have the Eligible for Service attribute enabled.

**Creating Products**

Creating a product includes entering product basic information and saving the product for the first time. Keep in mind that after you create a product using the simplified products UI, you cannot delete it. To “hide” products in consuming applications, deselect the Eligible to Sell option in the product details screen.

Use the following procedure to create a new sales product.

1. Sign in as the sales administrator and navigate to **Sales - Products**.
   
   The list of products appears.
2. Click the **Create Product** button.

   The Create Product page appears.
3. In the **Product Number** field, enter a unique product number. This field maps to the Item field in SCM Cloud products tables. You cannot edit this field after you save the product.
4. In the **Name** field, enter the name of the product whose number you entered. This field maps to the Description field in SCM Cloud products tables.
5. In the **Description** field, optionally, enter a description for the product. This field maps to the Long Description field in SCM Cloud products tables.
6. You can use product types to categorize your product inventory. Optionally, in the **Sales Product Type** field, select a product type. Sales products retrieve the list of values for Product Type from the lookup type QSC_SALES_PRODUCT_TYPE.
7. Select a **Default UOM**. This field maps to the Primary Unit of Measure field in SCM Cloud products tables. You cannot edit this field after you save the product.
8. Ensure that the **Eligible to Sell** option is selected. The Eligible to Sell attribute marks a product as available in the consuming sales applications. If this option is not selected, the product will not appear in the consuming sales applications.
9. Optionally, if integrating with the Oracle Engagement Cloud service request application, check the **Eligible for Service** option. Only products with this option set can be used in the service request application. This field maps to the Service Request field in the SCM Cloud products.
10. Save your changes.

**Note**: In the create and edit product pages, if the Sales Product Type selected is one of the following, then the Eligible for Service check box is cleared and disabled: Extended Warranty, Included Warranty, Preventive Maintenance, Service Level Agreement, Software Maintenance.
Editing Product Details

Editing products can include modifying product basic information and adding or updating attachments, URLs, and images.

Use the following procedure to edit product details:

1. Sign in as the sales administrator and navigate to Sales - Products.
   The list of products appears.

2. Select a product from the list. The following are the fields that you can edit:
   - **Name**: Name of the product. This field maps to the Description field in SCM Cloud products tables.
   - **Description**: Description for the product. This field maps to the Long Description field in SCM Cloud products tables.
   - **Sales Product Type**: Product category. Sales products retrieve the list of values for Product Type from the lookup type QSC_SALES_PRODUCT_TYPE.
   - **Eligible to Sell**: Marks a product as available in the consuming sales applications. If this option is not selected, the product will not appear in the consuming applications.
   - **Eligible for Service**: If integrating with the Oracle Engagement Cloud service request application, check this option. Only products with this option set can be used in the service request application. This field maps to the Service Request field in the SCM Cloud products.
   - **Attachments**: Add or remove attachments or URLs as needed. Multiple attachments or URLs can be associated with a product.
   - **Images**: Add or remove images as needed. Only one image can be associated with a product.

3. When done editing, save your changes.

Related Topics
- Adding Products to the Catalog: Procedure

Implementation Concepts for Sales Products

Sales Products and SCM Cloud Products: How They Work Together

When you create or update product information in Oracle Sales Cloud, the product information is automatically updated in the back-end application, Oracle Supply Chain Management (SCM) Cloud.

The following table shows the mapping between Sales Cloud product attributes and SCM Cloud item attributes.

<table>
<thead>
<tr>
<th>Sales Cloud Product Attribute</th>
<th>SCM Cloud Products Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inventory Item ID</td>
<td>Item</td>
</tr>
<tr>
<td>Organization ID</td>
<td>Organization</td>
</tr>
<tr>
<td>Number</td>
<td>Item (in SCM Cloud Items UI header region)</td>
</tr>
<tr>
<td>Name</td>
<td>Description (in SCM Cloud Items UI header region)</td>
</tr>
</tbody>
</table>
### Sales Cloud Attribute | SCM Cloud Products Attribute
---|---
Description | Long Description (in SCM Cloud Items UI Overview tab)
Product Type | Sales Product Type (in SCM Cloud Items UI Specifications tab and Sales and Order Management side navigation region)
Default UOM | Primary Unit of Measure (in SCM Cloud Items UI Overview tab)
Eligible to Sell | Customer Orders Enabled (in SCM Cloud Items UI Specifications tab and Sales and Order Management side navigation region)
Eligible for Service | Service Request (in SCM Cloud Items UI Specifications tab and Service side navigation region)
Attachments | Attachments tab (in SCM Cloud Items UI)
Image | Image (in SCM Cloud Items UI header region)

For more information, see the related topics and the following guides:

- Oracle SCM Cloud - Implementing Product Management
- Oracle SCM Cloud - Using Product Master Data Management

### Sales Products Business Object Logic: Explained

Oracle Sales Cloud product data follows specific business logic. For example, if you create a product in the sales products interface or using web services, the Inventory Item ID is null. However, if you create a product using file-based data import, the Inventory Item ID is the same as the Inventory Item ID in the Oracle Supply Chain Management (SCM) Cloud product tables.

The following table shows the business logic for various business objects with Oracle Sales Cloud products. In the table "sales product" means a product created in Oracle Sales Cloud products feature in the simplified UI. "Import" refers to the Oracle file-based data import feature.

<table>
<thead>
<tr>
<th>Sales Cloud Attribute</th>
<th>Business Logic</th>
</tr>
</thead>
</table>
| Inventory Item ID | • Sales product creation through UI or web services: null.  
• Sales product creation through import: Same as the Inventory Item ID for the SCM back-end item that is being created as the sales product. The SCM back-end item attribute should match the sales product Number attribute.  
• Required when a product is updated. |
| Organization ID | • Sales product creation through UI or web services: The value for the profile option QSC_SALES_PRODUCTS_INVENTORY_ORG_ID is set as the default.  
• Sales product creation through import: Same as the organization ID for the SCM Cloud back-end item that is being created in Sales products screens. |
| Item Master Organization | • Sales product creation through UI or web services: The value for the profile option QSC_SALES_PRODUCTS_INVENTORY_ORG_ID is set as the default. |
### Sales Cloud Attribute

<table>
<thead>
<tr>
<th>Business Logic</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Sales product creation through import: Same as the organization ID for the SCM Cloud back-end item that is being created in Sales products screens.</em></td>
</tr>
</tbody>
</table>

### Item Class

- **Required attribute when creating a new product in the SCM Cloud back-end products application.**
- **The value should be** **Root Item Class.**

### Template

- **Required attribute when creating a new product in the SCM Cloud back-end products application.**
- **The value should be** **Finished Goods.**

### Number

- **Required attribute when creating a new product or updating an existing product.**
- **The value must be unique for an item master.**
- **Creating a product with an existing number throws an API unique violation error.**

### Name

- **Required attribute when creating a new product.**
- **The value should be passed during product update only if changed.**

### Product Type

| Sales products retrieves the list of values for Product Type from the lookup type QSC\_SALES\_PRODUCT\_TYPE. |

### Default Unit of Measure (UOM)

- **Validated against all UOMs that are effective as of current date.**
- **Optional for create operation.**
- **Update of UOM is not allowed for saved products.**

### Eligible to Sell

- **All Sales products must have this indicator set to yes (checked).**
- **For update operation, pass only if changed.**
- **When a user sets it to no from yes, the corresponding SCM Cloud item indicators Customer Orders Enabled and Orderable on the Web are set to no.**
- **When a user sets it to yes from no, only the corresponding SCM Cloud item indicator Customer Order Enabled is set back to yes.**

### Eligible for Service

- **All Service products that will be used in the service request management application must have this indicator set to yes (checked).**
- **For update operation, pass only if changed.**
- **When a user sets it to no from yes, the corresponding SCM Cloud item indicator Service Request is set to Disabled**
- **When a user sets it to yes from no, the corresponding SCM Cloud item indicator Service Request is set to Enabled**

### Image

- **Image maps to the SCM Cloud attachment entity ITEM\_ENTITY and the category IMAGE.**
- **Only one image per product is allowed.**
- **Optional for create operation. For update operation, pass only if changed.**
- **In the case of errors, API messages are returned.**

### Attachments

- **A product can have multiple attachments.**
- **Only attachments of type “file” are allowed.**
- **Product attachments map to the SCM Cloud items attachment entity ITEM\_ENTITY.**
- **The attachment category can be one of the following:**
  - **One of the attachment categories associated with the Root Item Class except IMAGE.**
  - **Null**
- **Optional during product creation.**
- **Attachments can be added, updated, or deleted at any time.**
<table>
<thead>
<tr>
<th>Sales Cloud Attribute</th>
<th>Business Logic</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• In the case of errors, SCM Cloud API messages are returned.</td>
</tr>
</tbody>
</table>
13 Setting Up Sales Catalogs

Sales Catalogs: Overview

Using sales catalogs in Oracle Sales Cloud lets you:

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

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

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

Sales Catalog Key Features

The following are the main features of the sales catalog:

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

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

Initial Tasks for Sales Catalogs

Creating the Sales Catalog: Getting Started

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

High-Level Setup Steps

You must perform several steps to set up the sales catalog. The following table shows the high-level setup steps and where to find more information about the step.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Where to Find More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create the root product group.</td>
<td>Create the root product group. The root catalog or root product group is the top of the product group hierarchy. All other product groups are nested underneath.</td>
<td>Creating the Root Product Group section in this topic</td>
</tr>
</tbody>
</table>
# Setting Up Sales Catalogs

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Where to Find More Information</th>
</tr>
</thead>
</table>
| **Create the product group hierarchy.** | Add additional product groups to create the catalog hierarchy of product groups and subgroups. You can add the product groups manually in the product groups pages in Setup and Maintenance, or you can import them from a file. | • Creating the Product Group Hierarchy section in this topic  
• The topic, Importing Product Groups in the Oracle Sales Cloud - Getting Started with Your Implementation guide  
• The Importing Product Groups chapter of the Oracle Sales Cloud - Understanding File-Based Data Import and Export guide |
| **Publish the sales catalog.** | Publish the product group hierarchy that makes up the sales catalog. Perform this step in the product groups pages in Setup and Maintenance. When you publish a catalog, the scheduled process, Refresh Denormalized Product Catalog Table for BI, runs automatically to update the current view of the product group hierarchy in consuming applications. | • Publishing the Sales Catalog section in this topic  
• Running Refresh Denormalized Product Catalog Table topic |
| **Set the catalog’s usage to Base.** | To enable a sales catalog for use in Oracle Sales Cloud, you associate it with a “usage” called the Base usage. Perform this step in the product groups pages in Setup and Maintenance. Each time you make a new assignment of Base to a root product group, you must run the scheduled process, Refresh Denormalized Product Catalog Table for BI. If you do not run the process, your product group hierarchy may not appear in the consuming applications. | • Enabling the Sales Catalog topic  
• Running Refresh Denormalized Product Catalog Table topic |
| **Set the browse catalog profile option.** | Set the profile option, Browse Sales Catalog in Opportunities Enabled, to Yes to enable Browse Sales Catalog button on the Products table in the simplified UI. Perform this step in the Manage Opportunity Profile Options task in Setup and Maintenance. | Enabling the Sales Catalog topic |
| **Set usage options for searching and browsing.** | If you have set up the browse catalog feature, configure search and browse options. | Setting Options for Sales Catalog Searching and Browsing topic |
| **Verify your setups.** | After you have published and enabled your catalog, you will want to validate that the product groups are appearing in leads and opportunities. | Validating the Sales Catalog topic |
## Chapter 13
### Setting Up Sales Catalogs

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Where to Find More Information</th>
</tr>
</thead>
</table>
|      | Optionally, set up products to be able to use products in your sales catalog. You can use either Oracle Sales Cloud sales products UI or the product model, part of Oracle Supply Chain Management (SCM) Cloud. | If using Oracle Sales Cloud products:  
  - Setting Up Sales Products chapter in the Oracle Sales Cloud - Implementing Sales guide |
| Create products (items). | - If you do not have an integration with an order management application downstream, such as Oracle Configure, Price, and Quote (CPQ) Cloud, simply using product groups are sufficient for Oracle Sales Cloud and for integrations with other Oracle Applications Cloud services. | If using Oracle Supply Chain Management (SCM) Cloud product model:  
  - Oracle SCM Cloud - Implementing Product Management  
  - Oracle SCM Cloud - Using Product Master Data Management |
| Add products to the catalog. | Optionally, add the products you have created to the product group hierarchy. | Adding Products to the Catalog: Procedure topic |
| Integrate with Oracle Configure, Price, and Quote (CPQ) Cloud for additional capabilities. | Optionally, use the prebuilt Sales Cloud and Oracle CPQ Cloud integration. This integration lets sales representatives manage quotes and orders from accounts and opportunities, finalize pricing and proposals in Oracle CPQ Cloud, update opportunity revenue with quote lines for accurate forecasting, and access proposal documents from within Sales Cloud. | The article CPQ Cloud to Oracle Sales Cloud Integration White Paper (Doc ID 2015009.1) available on My Oracle Support |

### Creating the Root Product Group

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

Use the following procedure to create the root product group.

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Product Groups task.
3. The Manage Product Groups page appears.
4. Click the Create icon.
5. In the Name field, enter a unique name without spaces. This is the internal name of the group.
6. In the Display field, enter the product group display name. This is the name that displays in the UI to users.
7. Optionally, enter a description.
8. Optionally, enter the effective start and end dates.
9. Select the following check boxes:
   - **Active**: Only active product groups are available for use in the consuming applications.
   - **Root Catalog**: The root catalog is the top product group in the hierarchy. All other product groups created under it are considered subgroups. You can only add root catalogs to the Base usage in the Manage Product Group Usage page. Adding your catalog to the Base usage is a required step to enable the catalog for use in consuming applications.
   - **Locked**: This check box may already be checked. A product group must be "locked" to be edited.
9. Deselect the **Allow Duplicate Children** check box. This ensures that product groups and products do not appear multiple times in the hierarchy.

10. Click **Save and Close**.

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

**Creating the Product Group Hierarchy**

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

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

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

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

2. In the Manage Product Groups page, click the **Subgroups** tab in the main work area. The product group information for the selected group appears in the main work area.

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

3. Click the **Create** icon.

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

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

- **Active**: Only active product groups are available for use in the consuming applications.
- **Root Catalog**: Do not select the Root Catalog check box. You can have only one root catalog.

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

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

### Publishing the Sales Catalog

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

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

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

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

### Enabling the Sales Catalog

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

To enable the sales catalog, perform the following steps:

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

#### Set the Browse Sales Catalog Profile Option

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

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the task, Manage Opportunity Profile Options.
   
The Manage Opportunity Profile Options page appears.
3. In the search region, enter **Browse Sales Catalog in Opportunities Enabled** in the **Profile Display Name** field.
4. Click **Search**.
5. In the list that is returned, click on the profile option name link.
6. Set the profile option value to **Y**.
7. Save your changes.

**Associate the Root Catalog with Base Usage**

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

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

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

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

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

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

5. Select the record and click **OK**.

6. On the Manage Product Group Usage page, click **Save and Close**.

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

---

**Adding Products to the Catalog: Procedure**

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

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

**Adding Products to the Catalog**

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

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

2. Search for and select the Manage Product Groups task.
   
   The Manage Product Groups page appears.

3. In the Manage Product Groups page, in the product group hierarchy, select the product group that you are adding products to.

4. Lock the product group for editing by clicking the **Lock** button.

5. Click the **Products** tab for the product group you selected.

6. In the **View** filter at the top of the screen, ensure that the Administration view is selected.

7. In the products table, select **Actions - Select and Add**.
   
   The Select and Add: Products window appears.

8. Search for and select the product you're adding.

9. Click **Apply** and then **OK** in the select and add window.
The application returns to the Manage Product Groups page with the product added to the product group.

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

The product group is automatically published.

12. Save your changes.

Related Topics
- Sales Products: Overview

Validating the Sales Catalog

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

1. Sign in as a sales manager or salesperson.
2. Navigate to Sales - Leads and create a lead.
3. In the Create Lead window, click the Primary Product search icon and verify that you can see the product groups in the search utility.
4. Next, navigate to Opportunities and create an opportunity.
5. Search for the opportunity you just created and edit it.
6. In the Products region, click Add.
7. For Type, pick Group.
8. Under Product, from the list, verify that your product groups display.
9. In the Products table, click the Browse Sales Catalog button. Ensure that you can browse the catalog. Note that this option is available only if the administrator has enabled it.

Running Refresh Denormalized Product Catalog Table Process

Every time you publish a catalog, the scheduled process, Refresh Denormalized Product Catalog Table for BI, runs automatically to update the current view of the product group hierarchy in consuming applications.

In addition, each time you make a new assignment of Base to a root product group, you must run the process. If you do not run the process, your product group hierarchy may not appear in the consuming applications.

Running the Process

Use the following procedure to run the Refresh Denormalized Product Catalog Table for BI process:

1. Sign in as a setup user and navigate to Scheduled Processes.
3. In the Schedule New Process dialog window, click the down-arrow next to the Name field and click Search.
4. In the Search dialog window, enter %Refresh%, and click Search.
5. Select the Refresh Denormalized Product Catalog 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**.

Setting Options for Sales Catalog Searching and Browsing

The browse catalog feature lets sales users search and browse product groups and products in a hierarchy view. When configuring search and browse, you set the following two options:

- **Search Product Groups**: Specifies whether the search returns product groups and products, or only products. If you're using not using products in your catalog, then you must set this option to yes.
- **Show Immediate Child Products Only**: Specifies which products display under the Products heading in the Browse Catalog window. You can ignore this option if you’re not using products in your catalog.

**Search Product Groups Option**

In the Browse Catalog window, users enter keywords to search for product groups and products. The Search Product Groups option specifies whether the search should return product groups and products, or only individual products.

The following table illustrates how to use the Search Product Groups option.

<table>
<thead>
<tr>
<th>Description</th>
<th>Settings</th>
<th>Example When Set to Yes</th>
<th>Example When Set to No</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Determines whether the search finds product groups and products or only products.</td>
<td>- Yes: Search returns both product groups and products. If you’re using not using products in your catalog, then you must use this setting. - No: Search returns products only.</td>
<td>Search for the term Green: The application returns all product groups and products with that term in the name or description, such as Green Servers (product group), Green Server 3000 (product), and Green Server 6000 (product).</td>
<td>Search for the term Green: The application returns only products with that term in the name or description, such as Green Server 3000, Green Server 6000, and Green Server 9000.</td>
</tr>
<tr>
<td>Search names and descriptions.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>The default setting is no.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Show Immediate Child Products Only Option**

In the Browse Catalog window, users can browse product groups and products by selecting product groups. The Show Immediate Child Products Only option specifies whether to display only the products immediately within the selected product group, or also to display the products contained within the subgroups of the selected product group.

The following table illustrates how to use the Show Immediate Child Products Only option.

<table>
<thead>
<tr>
<th>Description</th>
<th>Settings</th>
<th>Example When Set to Yes</th>
<th>Example When Set to No</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Determines whether the browse feature shows only products within the selected product group in the catalog, or to also show products within the subgroups of the selected product group.</td>
<td>- Yes: Browse shows only the products within the selected product group. - No: Browse also shows the products within the subgroups of the selected product group. If you’re not using products in your catalog, only product groups, then this setting has no effect on the browse feature.</td>
<td>The product group Servers has no products within it, but its subgroups, Green Servers and UltraPro Servers, each have several products within them. The user clicks the Servers product group in the catalog browse pane. No products display in the Products section of the display page.</td>
<td>The product group Servers has no products within it, but its subgroups, Green Servers and UltraPro Servers each have several products within them. The user clicks the Servers product group in the catalog browse pane. The products contained within the Green Servers and UltraPro Servers product groups display in the Products section of the display page.</td>
</tr>
<tr>
<td>The default setting is yes.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>


Note: The two usage options discussed in this topic are supported in both the desktop and simplified UIs. For other display options supported only in the desktop UI, see the topic, Configuring Sales Catalog Usage: Explained.

Understanding Catalog Usage Option Modes
Before you set the usage options discussed here, be aware of the concept of "modes" for the catalog usage options. Each catalog usage option has a corresponding Mode value. The Mode setting lets you specify which application or applications the usage option applies to. If you leave the Mode value blank, then the usage option applies to all applications where the catalog is in use.

Setting the Search and Browse Options
Use the following procedure to set the sales catalog search and browse options.

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Product Group Usage task.
   The Manage Product Group Usage page appears.
3. In the Product Group Usage list, select the Base usage.
4. In the Base: Details region, click the Miscellaneous tab.
5. Find the option in the list and set it as needed. For example, set Search Product Groups to Yes for the mode, Opportunity Management.
6. Save your changes.

Additional Implementation Concepts for Catalogs

Creating a Sales Catalog: Worked Example
In this example, a business that sells chairs and sofas is implementing Oracle Sales Cloud, and, as sales administrator, you need to create its catalog.

Creating a Sales Catalog

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Product Groups task.
3. In the Manage Product Groups page, add a new record to the Product Groups list.
4. In the Details dialog box, enter the following data.

<table>
<thead>
<tr>
<th>Field</th>
<th>Sample Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>ComfyGooseCatalog</td>
</tr>
<tr>
<td>Display</td>
<td>Comfy Goose Catalog</td>
</tr>
<tr>
<td>Description</td>
<td>Contains ergonomic chairs for your home or office at attractive prices.</td>
</tr>
<tr>
<td>Root Catalog</td>
<td>Select this check box to make this a root catalog.</td>
</tr>
</tbody>
</table>
5. In the Details tab, select the image that you want to display in this catalog. Note that images only apply to use of the catalog in the desktop UI, not in the simplified UI.

6. In the Subgroups tab, create the following product groups, which are the categories for this product catalog.

<table>
<thead>
<tr>
<th>Field</th>
<th>Sample Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subgroup Name</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Chairs</td>
</tr>
<tr>
<td></td>
<td>Sofas</td>
</tr>
<tr>
<td></td>
<td>Medical Chairs</td>
</tr>
<tr>
<td></td>
<td>Sports Chairs</td>
</tr>
<tr>
<td></td>
<td>Chairs and Stools</td>
</tr>
</tbody>
</table>

7. Add further categories within some subgroups by switching from List to Tree view and selecting the categories within which you want subgroups.

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

The following figure shows the hierarchy icon above the catalog name in the left pane of the Manage Product Groups page. Click the icon to view the product group in hierarchy mode, as shown in the lower portion of the figure.
Add the following categories within subgroups.

<table>
<thead>
<tr>
<th>Parent Subgroup</th>
<th>Sample Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chairs</td>
<td></td>
</tr>
<tr>
<td></td>
<td>o Heavy Duty/Call Center Chairs</td>
</tr>
<tr>
<td></td>
<td>o Ergonomic Chairs</td>
</tr>
<tr>
<td></td>
<td>o Leather Chairs</td>
</tr>
<tr>
<td></td>
<td>o Event Chairs</td>
</tr>
<tr>
<td>Sofas</td>
<td>Sofas and Loveseats</td>
</tr>
<tr>
<td>Sofas and Loveseats</td>
<td>o Leather Sofas</td>
</tr>
<tr>
<td></td>
<td>o Reception and Lounge Sofas</td>
</tr>
<tr>
<td></td>
<td>o Loveseats</td>
</tr>
</tbody>
</table>

8. In the Products tab, add products to all the subgroups that you created.
9. Click **Publish** to publish the product hierarchy that you just created.

A published catalog is available for use by different departments.

10. You must enable a sales catalog for use in Oracle Sales Cloud, by associating it with the Base usage. To associate a published catalog with a particular usage, go to the Product Group Usage page and select the Base usage. Then, click the Product Groups subtab and select the catalog that you just created.

For additional information on getting started with creating sales catalogs, see the topic, Creating a Sales Catalog: Getting Started.

**Reusing a Sales Catalog: Worked Example**

This example demonstrates how you can reuse a sales catalog. After creating a catalog for a business that sells chairs and sofas, you get a call from another division of the company that wants a similar catalog with the same look-and-feel.

You find that this division needs the products in the Chair category of your existing catalog, so you can reuse this category instead of creating a new catalog.

**Note:** To complete this task, an application developer must create an application that can use the sales catalog task flows, just like the Sales module uses the task flows provided by the sales catalog team.

**Prerequisite**

You can choose only product groups that are catalogs themselves. In other words, the catalog must be a root catalog. You realize the Chairs group is a category of your larger catalog, so you must make it a root catalog as a prerequisite to reusing the category.

1. On the Manage Product Groups page, in the product group list, select Chairs.
2. In the Details tab, select the Root Catalog check box.
3. Save and publish the catalog.
Reusing the Sales Catalog

1. On the Manage Product Group Usage page, create a new usage and name it the Call Center Division usage.
2. Click the Product Groups subtab.
3. In the Manage Product Groups Usage page, add the product group Chairs to the new usage that you created.

   The Chairs catalog is now available for the Call Center Division.

Configuring Sales Catalog Usage: Explained

You can set various usage options to customize the display and actions of your sales catalog. For example, you can modify the display of product groups in the desktop UI, such as by controlling the label that the add item button displays.

The following options are configurable at the product group level:

- **Modes**: Modes let you specify options at the application or module level.
- **Templates**: Templates determine the look and feel of the catalog for a specific mode.
- **Functions**: Functions specify catalog actions, such as whether to filter the catalog display based on the user’s territory.
- **Miscellaneous usage options**: Usage options let you fine-tune catalog display.

**Note**: In the default implementation, the catalog used by the sales applications is the one assigned to the Base usage.

You set the options in the Manage Product Group Usage pages in Setup and Maintenance. For steps to set the usage options, see the topic, Setting Catalog Usage Options: Procedure.

Catalog Functions

You can specify values for sales catalog functions, as shown in the following table.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pricing Engine</td>
<td>Determines the price for a product.</td>
<td>Do not run</td>
<td>Do not call the pricing service.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Complex</td>
<td>Show the List Price, Your Price, Discount, and so on.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Simple</td>
<td>Show the List Price only.</td>
</tr>
<tr>
<td>Territory Engine</td>
<td>Determines the products in a territory.</td>
<td>Do not run</td>
<td>Do not check for territory information. Do not filter user's view of catalog by territory.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Enforce territory</td>
<td>Only show the products and product groups that are part of the user's territory.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Display user choices</td>
<td>Allow users to toggle between all product or product groups and</td>
</tr>
</tbody>
</table>
Miscellaneous Usage Options

In the Miscellaneous tab of the Product Group Usages page, you can set several catalog options. For example, you can change the add item button label, enable sort by text, specify the number of products per page, and configure search and browse actions in the catalog. The following table shows the options available.

With the exception of Search Product Groups and Show Immediate Child Products Only, these options affect only desktop UI actions.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add category button label</td>
<td>The selected value is shown next to the catalog or category at run time.</td>
</tr>
<tr>
<td>Add item button label</td>
<td>The selected value is shown next to the product in run time. By default, this button displays Add to Opportunity when in the context of opportunities, but you might want to change it to use some other label, such as Add to Cart.</td>
</tr>
<tr>
<td>Adding category enabled</td>
<td>Allows buttons to be shown next to the catalog or categories.</td>
</tr>
<tr>
<td>Enable transactional attribute</td>
<td>Allows transactional attributes to show up in product detail page. Transactional attributes are attributes that can be selected such as color and size of shirt.</td>
</tr>
<tr>
<td>Hidden category optional attribute list</td>
<td>Allows you to specify attributes to hide from the category list. Enter a comma-separated list of attributes to be hidden.</td>
</tr>
<tr>
<td>Hidden product optional attribute list</td>
<td>Allows you to specify attributes to hide from the product pages. Enter a comma-separated list of attributes.</td>
</tr>
<tr>
<td>Hide quantity</td>
<td>Set to Yes to hide the quantity field shown in the product page.</td>
</tr>
<tr>
<td>Hide unit of measure</td>
<td>Set to Yes to hide the unit of measure field shown in the product detail page.</td>
</tr>
<tr>
<td>Image server alternate path</td>
<td>Identifies an alternate image source location (URL).</td>
</tr>
<tr>
<td>Image server source</td>
<td>Identifies the source of images for products and product groups.</td>
</tr>
<tr>
<td>Records per page</td>
<td>The number of records to be displayed per page.</td>
</tr>
<tr>
<td>Search Product Groups</td>
<td>Determines whether the catalog search returns product groups and products or only products. If you're using not using products in your catalog, then you must set this option to yes in order for the catalog search to work.</td>
</tr>
<tr>
<td>Show immediate child products only</td>
<td>Specifies which products display under the Products heading in the Browse Catalog window. You can ignore this option if you're not using products in your catalog.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Sort by format text</td>
<td>The sort format of the entire label that you want displayed in the run time interface. The default is {ATTR}: {SORT_ORDER}. Example: Name: A to Z.</td>
</tr>
<tr>
<td>Sort by product label prefix</td>
<td>The sort format of the prefix label that you want displayed. Example: If the default is Name: A to Z, you can select an alternate label for Name. It could be Item: A to Z.</td>
</tr>
<tr>
<td>Sort by sequence ascending first</td>
<td>Select Yes to display ascending labels first in the Sort By LOV.</td>
</tr>
<tr>
<td>Sort by sequence product ascending label</td>
<td>The sort format of the ascending suffix label that you want displayed. Example: If the default is Name: A to Z, you can select an alternate for A to Z. It could be Name: Ascending.</td>
</tr>
<tr>
<td>Sort by sequence product descending label</td>
<td>Sort format of the descending suffix label that you want displayed. Example: If the default is Name: Z to A, you can select an alternate for Z to A. It could be Name: Descending.</td>
</tr>
</tbody>
</table>

Setting Catalog Usage Options: Procedure

You can set usage options to control the display and actions of your sales catalog. For example, you can control the label that the add item button displays, or configure whether to show product groups and products when users browse the catalog sections.

Setting Usage Options

Use the following procedure to set usage options.

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Product Group Usage task. The Manage Product Group usage page appears.
3. In the Manage Product Group usage page, select the Base usage.
4. In the Details region, click the Miscellaneous tab.
5. For each attribute, click the row that has the application you want to modify in the Application column, and then make your selections.
6. Save your changes.

Performance-Tuning Opportunity Products Search: Explained

By setting a profile option, you can enable or disable the smart list in the Product list of values in the Products table in opportunities. The smart list is a pre-fetched list of products. For performance reasons, Oracle recommends that if you have more than 5,000 products in the application, then you should prevent the entire smart list from being pre-loaded when a user clicks the pre-loaded list.
As a user types, the application searches against the product smart-list entries. If the user clicks the drop-down list then the application initializes the complete smart-list. To disable the preload of the smart list, set the profile option Preload Territory-Filtered Product List Enabled (ZBS_ENABLE_PRODUCTLOV_SMARTLIST) to No. By default, the profile option is set to yes.

**Note:** This profile option only applies to the desktop UI.

### Setting the Profile Option

Use the following procedure to set the profile option.

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, Preload Territory-Filtered Product List Enabled, or the code, ZBS_ENABLE_PRODUCTLOV_SMARTLIST.
4. Set the profile option to No to disable the preload of the smart list.
5. Save your changes.

### What's the difference between the administration and published product group versions?

The administrator who defines the product group uses the administration version.

The user of the sales catalog sees the published version.

**Note:** When you publish the administration version, you make it available as the published version.

### What's a related group?

A related group shows the relationship between two different product groups. For example, a group that contains extended warranties for computers is related to a group that contains laptop computers. Various relation types are supported, such as revenue, service, and so on. This relationship is used in the other applications.

### What's a rollup catalog?

A rollup catalog is used primarily to create a hierarchy that’s useful for forecasting. In forecasts, each product appears only once, so the rollup catalog can’t have the same product appearing multiple times within its hierarchy.

A sales catalog can have the same product appearing multiple times within its hierarchy. For example, the product Toys can be part of the Children category as well as the Electronics category within the same catalog.

**Note:** The Allow Duplicate Children check box distinguishes controls whether a product group can have duplicate child nodes.
How can I change sales catalog button labels?

You can change display attributes of specific product groups. For example, you can change the default Add to Cart label, and you can select a different label, such as Add to Shopping Cart. On the Manage Product Groups page, select the **Display Options** tab and the **Miscellaneous** subtab.

Before you can select values as button labels, they must be values of the lookup Add Item Label Values in the Manage Product Group Lookups page.

Catalog Maintenance

How can I change the labels for filter attributes at run time?

In the Filter Attributes tab of the Manage Product Group page, change the value in the Display field for the attribute.

You can create a name displayed at run time, which is more user-friendly than the attribute’s internal name. For example, if the attribute name is Laptop Color, then you can change the display name to Available Colors. This new name will be displayed in the Narrow By or Advanced Search options at run time.

Adding Filter Attributes to Sales Catalog Product Groups: Worked Example

This example shows how to enable filtering by attributes in the sales catalog.

Use case: A business that sells furniture wants to provide filters in the catalog that let users narrow the product groups based on an attribute, such as color.

Prerequisite

Before you perform this task:

- The filtering attributes must already be registered. You register attributes in the Manage Product Group Attributes page.
- The filtering attributes must be associated with the products in the item master.

Filtering Product Groups by Attributes

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Product Groups task.
   
   The Manage Product Groups page appears.
3. In the Manage Product Group page, select a product group. For example, select the group named Chairs.
4. With the product group selected, click the **Lock** button.
5. Click the Filter Attributes tab.
6. In the Filter Attributes tab, click **New** to add a new attribute.
   The Create Filter Attribute dialog box appears.

7. In the Create Filter Attribute dialog box, **Name** field, search for and select the filter attribute.
   For example, select the Color attribute.

8. Optionally, in the Create Filter Attribute dialog box, select the Advanced Search, Narrow By and Sort By check boxes for the attribute, so that this attribute will be displayed in those regions at run time.

9. Click **OK** in the Create Filter Attribute dialog box to save your changes.

10. In the Attribute Values area, add records and enter values for the attributes.
    For example, add Blue, Pink, and Black as the values for the chair color.

11. Unlock the group, save the changes, and publish the product group.
    After publishing the product group, you validate the changes in the catalog. You can see the attributes that you created and their values in the Advanced Search, Narrow By, and Sort options of the catalog.

**How can I set exceptions for particular usages of product groups?**

On the Manage Product Group Usage page, select the product group in the Product Groups tab, select the usage in the Modes tab, and use the other tabs to specify the exceptions for this usage.

You use this method to modify the appearance of a product group in minor ways for different uses. For example, you might want a product group to look slightly different when it is used for lead management and for campaign management.

**Catalog Troubleshooting**

**Best Practices for Sales Catalog Setup**

Sales catalog and product group setup can be quite complex. Therefore, be sure to follow the best practices described in this topic.

The following are the main best practice areas covered in this topic:

- Importing product groups
- Finding and entering reference numbers
- Checking your work before publishing or importing
- Locking and publishing product groups
- Associating the product group root with the Base usage
- Creating a new product group hierarchy
- Running a scheduled process after changing Base usage

**Importing Product Groups**

If your import file contains spelling and other errors, you can make your corrections in the same file and import again. The import process overwrites the existing entries.
Finding and Entering Reference Numbers

Unique product group reference numbers can be used to establish the relationships between parent and child product groups in the file-based import spreadsheet. You can find the reference number in the Reference Number column in the Manage Product Groups page.

In your import spreadsheet, be sure any numbers are formatted as numbers (versus, for example, formulas), with zero digits to the right of the decimal. Otherwise, the import process cannot recognize them. For example, generally, when you paste the reference number into a spreadsheet, the spreadsheet will automatically format it as something other than a plain number. In order for the import process to recognize the number as a number, you may need to explicitly format it as a number (with zero digits to the right of the decimal).

The following figure shows an example of a reference number after being pasted into a spreadsheet cell (in the first highlighted box), and then the same reference number formatted as a number with no digits to the right of the decimal (in the second highlighted box).

Checking Your Work Before Publishing or Importing

After you have published a product group, you cannot delete it. You can only make it inactive. For this reason, you should check your work before you publish the product groups you create in the UI and before you import. Importing publishes all unpublished product groups automatically, even those that are not in your file.

1. Click on the root group name in the list and then click the tree view icon in the tool bar.
2. Check that the names are correct and that the hierarchy is set up as you want it.

Locking and Publishing Product Groups

Any product group you want to edit must be "locked". You lock a group by selecting it in the UI and then clicking the Lock button. When you lock a product group, no one else can make changes to it until it’s unlocked again.

Any product group hierarchy you want to use in consuming applications must be published. Publishing is done by clicking on the root node of the group and then clicking the Publish button or when you import your product group data file. When you publish, the application will publish all product groups that are locked. If you don’t want some groups to be published, then you must unlock them.
Setting Product Group Hierarchy Base Usage

The root product group you use for leads, opportunities, and territories must be assigned to a usage called "Base". This assignment is performed in the Manage Product Group Usage page accessible in Setup and Maintenance. Use the Manage Product Group Usage task to get to the page.

Note: The root product group must be published to be able to associate it to Base usage.

Creating a New Product Group Hierarchy

If for some reason you don’t want to use a product group hierarchy that you have created, you can always create a new root and subgroups, publish them, and associate the Base usage with the new product group root.

Running a Scheduled Process After Changing Base Usage

Each time you make a new assignment of Base to a root product group, you must run the scheduled process Refresh Denormalized Product Catalog Table for BI. If you do not run the process, your product group hierarchy may not appear in the consuming applications. Also, if you use future start or end dates for product groups, then you should schedule the refresh process periodically as well.

How can I check whether my catalog is used by other catalogs?

You can get this information from the Sharing region in the Manage Product Groups page. By default, all product groups can be shared.

Why can't I modify a product group?

To modify a product group, you must first lock it. Select Lock in the Manage Product Group page. If the product group is locked by another user, then the locked indicator is visible, and you cannot modify the product group.

Why did some of the products in my published catalog disappear?

Products in your catalog are active for a specified period. When the product is no longer active, it doesn't appear in the published catalog. You can activate products using the Products tab of the Manage Product Groups page.
14 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>
</table>
| Draft  | Indicates a price book that is not yet available for use. | • Only price books in Draft status can be deleted.  
• Can be moved to Active status. |
| Active | Indicates a price book that is available for use. | • Can be updated to Expired status. Note you cannot delete expired price books.  
• Cannot be updated to Draft status. |
| Expired | Indicates a price book that is no longer available for use. | • Cannot be moved to Draft status; therefore, can never be deleted. |
The following image shows the transitions allowed for the statuses.

![Price Book Status Transitions](image)

**Related Topics**
- Sales Products: Overview
- Sales Catalogs: Overview
- Creating a Sales Agreement Line: Explained
- Managing Price Books and Taxation in Oracle Sales Cloud for Consumer Goods

**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.
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. The default status for a new price book is Draft.
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
15 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.
16 Setting Up 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>
</tbody>
</table>
### Decision Question | Profile Option
---|---
Which lead qualification rules do you want to use? | Assignment Rule for Qualifying Leads
Which leads scoring rules do you want to use? | Assignment Rule for Scoring Leads
Do you want to display the assessment tab in the Edit Lead page? | Lead Assessment Enabled
Which assessment template do you want to use for lead qualification? | Lead Assessment Template Default, Advanced Lead Qualification Enabled, Lead Qualification Template
How many days should you look back when querying leads in Search? | Lead Query Maximum Number of Days, Lead Query Default Number of Days, Lead Query Warning Threshold Number of Days
Do you want to set the maximum number of leads that can have mass update applied in one user action? | Leads Mass Update Threshold Value
Do you want users to the able to add or edit products to leads? | Add and Edit Products to Leads Enabled
Do you require additional search criteria, other than creation date, when searching across all leads, or for searches relying on hierarchy rollups? | Require Additional Criteria for Lead Search Enabled
Do you want to set context-based data security policies for improved performance of lead search? | Lead Search Context-Based Data Security Enabled

### 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>
<tbody>
<tr>
<td>Lead Retire Reason</td>
<td>Possible reasons for retiring leads. Retired leads are considered closed leads. Values include: Duplicate lead or No purchase interest Lead</td>
</tr>
<tr>
<td>Reject Reason</td>
<td>Possible reasons specified for rejecting leads. Rejected leads can be reassigned or retired. Values include:</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, and 18 months

Lead Reassignment Reason
- Possible reasons specified for reassigning leads. Values include:
  - No activity, Other, and Workload

Lead Rank
- Lead rank values used as a measure of lead quality and prioritization. Values include:
  - Cool, Hot, and 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, and 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 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>
</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>
<tbody>
<tr>
<td>Lead Query Maximum Number of Days</td>
<td>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.</td>
</tr>
</tbody>
</table>
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

**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 lookup 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></td>
<td>• Rejected</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>• Schedule date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Repeats</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>
</tbody>
</table>

The Reassign indicator is set to:

- N when lead is processed by Lead Assignment Job
## Lookup Type | Lookup Values | Description
--- | --- | ---
**Lead Registration Approval Status** | • Approved  
• Pending approval  
• Rejected  
• Submitted | Approval status for leads registered by partners.

**Lead Registered Status** | • No  
• Yes | Status that indicates whether or not a partner lead is registered.

**Lead Search Filter Record Sets** | • All records I can see  
• Records in my territory hierarchy  
• Records in my territory  
• Records I own  
• Records where I am on the team  
• Records where my subordinates are on the team | Record visibility filters for lead search.

**Lead Status** | • Converted  
• Qualified  
• Retired  
• Unqualified | Lead status values based on specific actions performed on a lead. Used to mark the milestones in the lead life cycle.

**Lead Retire Reason** | • Duplicate lead  
• No purchase interest | Possible reasons for retiring leads. Retired leads are considered closed leads.

**Lead Yes or No Indicator** | • Yes  
• No | Generic status that indicates yes or no with reverse meanings.

**Recommended Lead Actions Type** | • Accept leads  
• Create sales campaign | Type of actions to perform on recommended leads.

### 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>
</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.

**Lead Rank** | • Cold  
• Hot | Lead rank values used as a measure of lead quality and prioritization.
### 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>
</table>
| Deal Registration Access Level | • Edit  
• Full  
• View only | Specifies the access level of team members for actions they can perform on deal registrations. 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. |

---

### Lead Lookups

The following table displays lead lookup names, the values, and the descriptions.

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Lookup Values</th>
<th>Description</th>
</tr>
</thead>
</table>
| Lead Reassignment Reason  | • No activity  
• Other  
• Workload | Possible reasons specified for reassigning leads. |
| Lead Reject Reason        | • Duplicate lead  
• Failed to reach contact  
• Incorrect data | Possible reasons specified for rejecting leads. Rejected leads can be reassigned or retired. |
| Lead Retire Reason        | • Duplicate lead  
• No purchase interest | Possible reasons for retiring leads. Retired leads are considered closed leads. |
| Lead Registration Type    | • Co-sell  
• Referral  
• Resale | Types of leads available for partners. |
| Lead Source Channel       | • Direct mail  
• E-Mail  
• Fax  
• Marketing Cloud  
• Phone  
• Sales campaign  
• Sales visit  
• Social  
• Company web site  
• Wireless message  
• Model-based prediction  
• Rules-based prediction | Source channel responsible for lead generation. |
| Lead Time Frame           | • 3 months  
• 6 months  
• 9 months  
• 12 months  
• 15 months  
• 18 months | Lead cycle duration that usually coincides with a typical sales cycle duration for products and services offered. |
## Lookup Type

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Lookup Values</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>
<tr>
<td></td>
<td>• Returned</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Withdrawn</td>
<td></td>
</tr>
<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>
</tbody>
</table>

**Related Topics**
- Lookups: 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.
Oracle Sales Cloud
Implementing Sales

Chapter 16
Setting Up Leads

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.

Mass Update of Leads

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?
17 Setting Up Opportunities

Opportunities: Overview

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

The following table lists opportunity features.

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

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

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

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

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

### Related Topics
- Opportunity Products and Revenue: Overview
- Sales Credits: Overview
- Sales Prediction: Overview

## Sales Methods, Sales Stages, and Sales Coach

### Sales Methods, Sales Stages, and Sales Coach: Overview
You can use sales methods and sales stages to employ the sales methodology that best aligns with an opportunity. Use Sales Coach, which administrators set up within sales stages, as both a teaching tool and a method to make your organization’s best-practice information readily available to salespeople.

### Sales Methods and Sales Stages
Sales methods are an opportunity attribute that link sales strategy to sales execution. For example, is the customer more interested in price, features, service, or delivery time? After you make these decisions, you can align your sales methods and sales stages to reflect these customer requirements. For example, you can use a different sales methodology for your price-conscious customers than for your customers who are interested in features. A sales method can include all activities associated with the different sales stages during the sales process, from qualifying, to negotiating, to closing.

The application comes with a few sales methods and associated sales stages. Administrators can modify the supplied sales methods and stages, or create new ones.
Sales Coach

Sales Coach is a virtual coach available to salespeople while they view or edit an opportunity. For example while viewing an opportunity, a salesperson will see Recommended Documents for the sales stage that his opportunity is in. He can download the Recommended Documents that his administrator has posted to help with the sale.

The following table describes the tools available as part of sales methods and sales stages.

<table>
<thead>
<tr>
<th>Tool</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action items (called process steps in the setup UI)</td>
<td>Part of Sales Coach. Guides salespeople through an organization’s sales best-practice processes for a particular sales stage.</td>
</tr>
<tr>
<td>Recommended documents</td>
<td>Part of Sales Coach. Provides coaching strategies and best-practice information in the form of documents, such as customer letter templates, relevant web sites, and training materials.</td>
</tr>
<tr>
<td>Task templates</td>
<td>Provides a list of required or recommended tasks relevant to a particular sales stage. Recommended task templates are optional. Autogenerated task templates are automatically applied to your list of tasks for a particular sales stage, when the opportunity moves to that stage. Note that task templates are not supported in the simplified UI.</td>
</tr>
<tr>
<td>Assessment templates</td>
<td>Helps salespeople analyze and score an opportunity attributes. After selecting an assessment type, salespeople enter a series of responses to achieve a weighted score. This score then helps determine the success rate of the opportunity.</td>
</tr>
</tbody>
</table>

In addition, for each sales stage, administrators can set certain fields in the opportunity header that salespeople must enter before the opportunity can progress to the next sales stage. The required fields functionality is available in desktop UI only.

For more information, see the related topics.

Related Topics

- Sales Coach: Explained

Sales Stages: Explained

Sales stages track the progress of an opportunity during the sales cycle. Salespeople change the sales stage when they determine it’s time to move the opportunity to the next stage.

Sales Stage Attributes

Administrators typically set up the following attributes while setting up sales stages:

- Phase: A step in the sales cycle of an opportunity.
  For example, the first step might be Discovery, where the salesperson researches the customer’s needs.
- Order: The sequence of the stage within a sales method.
  For example, you might start with Discovery and move to Conclusion.
- Duration: The number of days an opportunity will remain in this stage.
• Stalled Deal Limit: The number of days an opportunity can remain in this stage before it is considered stalled.

Administrators also can associate elements of Sales Coach, such as recommended documents, action items, or assessments, with a sales stage.

Related Topics
• Sales Methods and Sales Stages: How They Fit Together
• Sales Coach: Explained

Managing Opportunity Sales Methods and Stages

Watch: This tutorial shows you how you can use Oracle Sales Cloud to easily modify the supplied opportunity sales methods and sales stages to fit your business requirements.

Configuring Sales Methods and Stages

You can create and edit sales methods and their stages by following the procedures in this topic.

Note: This topic does not cover the following aspects of sales methods and stages setup:

• Recommended documents
• Action items (called process steps in the setup UI)
• Assessment Templates
• Activity Templates
• Required fields

For information on setting up these aspects of sales methods and stages, see the related topics.

Creating or Editing Sales Methods

Use the following procedure to create new or modify existing sales methods.

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 Sales Methods and Sales Stages.
3. If you want to create a sales method: In the Manage Sales Methods page, click the Create icon.
4. If you want to edit a sales method: In the Manage Sales Methods page, drill down on the sales method, or select the row showing the sales method and click the Edit icon.
5. In the Create Sales Method or Edit Sales Method page, fill in the required information. The following are the more complex attributes of sales methods:
   o Set: A set represents a group of business units. The Set field allows the sales method to be shared across multiple business units. Select the Common Set, unless you are aware that a different set should be selected.
   o Close Window: Set in days, the Close Window value is added to the current date to set the initial opportunity close date. If not set, the application retrieves the default close window from the Opportunity Close Date Default profile option.
   o Disable: The Disable check box lets you disable the sales method. Only disable sales methods during implementation and not after the methods are in use in current opportunities.
6. Add new or modify existing sales stages as described in the following section, Creating or Editing Sales Stages.
7. Save your changes.

Creating or Editing Sales Stages
Use the following procedure to create new or modify existing sales stages.

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 Sales Methods and Sales Stages.
   The Manage Sales Methods page appears.
3. Select the sales method whose sales stages you want to customize.
   The Edit Sales Method page appears.
4. To add another sales stage to the sales method: In the Edit Sales Method page, click the Create icon and fill out the required information in the Create Sales Stage page.
5. To edit a sales stage: In the Edit Sales Method page, drill down on the sales stage, or select the row and click the Edit icon. Fill out the required information in the Edit Sales Stage page.
6. Set or enter attributes of sales stages. The following are the more complex fields:
   a. Disable: This check box lets you disable the sales stage. Only disable sales stages during implementation and not after the stages are in use in current opportunities.
   b. Win Probability: This field represents the likelihood (in percent form) of winning the opportunity. This Win Probability field sets the default win probability at opportunity level for the sales stage. If you don’t want your sales stages to control opportunity win probability, make sure they are null by blanking out any value in this field.
   c. Duration: Enter the average number of days you expect opportunities to stay in this stage. This field is used in the Stalled Deals infolet and underlying report. When opportunities are in a sales stage longer than the value entered here, they are considered stalled at that stage, and are reported in the stalled deals infolet on the simplified UI dashboard.
7. Save your changes.

Related Topics
• Sales Methods and Sales Stages: How They Fit Together

Associating Sales Coach and Other Elements with Sales Stages: Explained
Sales Coach is a mechanism to present best practice sales methodology to salespeople in order to improve their sales effectiveness. A teaching tool, Sales Coach can help less experienced salespeople with aspects of an opportunity when and where they need help. Administrators set up Sales Coach by associating action items and recommended documents with a sales stage. Salespeople can then view these items as they work their opportunities. Since the teaching components or job aids are associated with a specific sales stage, each sales stage potentially can have multiple action items and recommended documents associated with it.

The following are the elements that you can define for each sales stage:

• Sales Coach items:
  a. Action items (process steps): These are recommended actions the salesperson should take while working an opportunity in a specific sales stage. This functionality works both in the desktop UI and in simplified pages. In simplified pages, Action Items appear in the Sales Coach region of the edit opportunity page.
Recommended documents: These are documents, files, or URLs recommended for viewing or sharing during a specific sales stage. This functionality works both in the desktop UI and in simplified pages. In simplified pages, Recommended Documents appear in the Sales Coach region of the edit opportunity page.

Other items:
- Task templates: You can define task templates to set tasks for salespeople to perform. For more information, see the topic, Associating Task Templates with Opportunities: Explained, and the video tutorial, Adding Task and Assessment Templates to Sales Stages.
- Assessment templates: Assessments let salespeople evaluate the health of an opportunity. This functionality works both in the desktop UI and in simplified pages. In simplified pages, opportunity assessments appear under a separate tab labeled Assessments in the edit opportunity page. For more information, see the topic, Associating Assessment Templates with Opportunities: Explained, and the video tutorial, Adding Task and Assessment Templates to Sales Stages.
- Required fields: You can mark specific fields as required for a specific sales stage. This functionality works both in simplified and desktop UIs. When a salesperson moves an opportunity to that sales stage, the fields you mark as required become marked with an asterisk and are required to be entered before moving to the next sales stage.

Adding Action Items (Process Steps)
Use the following procedure to add action items to a sales stage. Note that in the setup pages, action items are set up in the Process Steps region.

1. As a user with access to the sales methods pages, such as the sales administrator, or as a setup user, navigate to Setup and Maintenance.
2. Search for and select the task, Manage Sales Methods and Sales Stages.
   The Manage Sales Methods page appears.
3. Click the sales method whose sales stages you want to customize.
   The Edit Sales Method page appears.
4. In the Edit Sales Method page, click the sales stage you want to configure. In the upper portion of the page, it’s assumed you would have already filled out the core information for the sales stage. For more information on these fields, see the topic, Configuring Sales Methods and Stages.
5. In the Process Steps region, click the create icon to create a process step. Enter your process step information. For example, a first process step or action item might be “Gather High Level Information from Customer”.
   Process steps show up as Action Items in the Sales Coach region in the edit opportunity simplified pages. The action items only show up when the opportunity is in the sales stage that you associated the process steps with.
6. Save your changes.

Adding Recommended Documents
To add recommended documents, edit a sales stage using the steps in the procedure, Adding Action Items (Process Steps), above. In the Recommended Documents region, attach documents, files, or URLs that you want your salespeople to have access to in the edit opportunity simplified pages. For example, you may want to give your salespeople access to marketing materials, collateral, or web sites. Recommended documents are available in the edit opportunity page when the salesperson is editing the opportunity in the sales stage that’s associated with these documents.

Related Topics
- Using Sales Coach
- Task Templates: Explained
Adding Task and Assessment Templates to Sales Stages

Watch: This tutorial shows you how you can use Oracle Sales Cloud to easily associate task and assessment with opportunity sales stages.

Associating Assessment Templates with Opportunities: Explained

Assessments let salespeople evaluate the health of an opportunity while working it. Assessments can be used, for example, to help determine whether an opportunity is viable enough for the salesperson to offer an incentive, such as a discount, to the customer. Assessments include questions with scored responses. Responding to the questions provides the salesperson with immediate scoring and recommendations or follow-up business processes. You create assessment templates in the setup pages and then add the assessment template to an opportunity sales stage. The assessment generated from the template are accessible to salespeople in the Assessments tab in opportunities for the sales stage you associated them with.

Following are the high-level steps to add assessments to sales stages:

1. Define your assessment templates using the Manage Opportunity Assessment Templates task available from the Setup and Maintenance work area.
   For more information, see the Setting Up Assessments chapter in the Oracle Sales Cloud - Implementing Sales guide. The topic, Creating Assessment Templates: Procedure, has the steps.

2. Edit a sales stage and, in the Assessment Templates area, associate the assessments with a sales stage. Mark the assessment mandatory to make it required that the salesperson complete the assessment before he can move the opportunity to another sales stage.
   See the topic, Performing an Opportunity Assessment: Procedure, for more information on the end-user perspective. This topic is available in the Oracle Sales Cloud - Using Sales guide, in the Managing Opportunities chapter.

Adding Assessments to Sales Stages

Use the following procedure to add an assessment template to an opportunity sales stage.

Note: You must have already created an assessment template before it will be available to add to a sales stage. See the topic, Creating Assessment Templates: Procedure, for the steps.

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the task, Manage Sales Methods and Sales Stages.
   The Manage Sales Methods page appears.
3. Click the sales method whose sales stages you want to customize.
   The Edit Sales Method page appears.
4. In the Edit Sales Method page, click the sales stage you want to configure. In the upper portion of the page, it’s assumed you would have already filled out the core information for the sales stage. For more information on these fields, see the topic, Configuring Sales Methods and Stages.
5. In the Assessment Templates region, click the create icon.
6. Search for and select the assessment template you created earlier.
7. In the **Type** column, pick:
   - Recommended if you want the salesperson to have access to the assessment in the Assessments tab for this sales stage, but not be required to fill it out before moving the opportunity to the next sales stage.
   - Mandatory if you want the salesperson to have access to the assessment in the Assessments tab for this sales stage, and be required to fill it out before moving the opportunity to the next sales stage.

8. Save your changes.

**Related Topics**
- Setting Up Opportunity Assessments: Points to Consider
- Creating Assessment Templates: Procedure

**Associating Task Templates with Opportunities: Explained**

A task template is a group of tasks associated with a business object, including opportunities. You create a task template in the setup pages and then add the task template to an opportunity sales stage. The tasks generated from the template are accessible to salespeople in the Activities tab in opportunities, for the sales stage you associated them with.

Following are the high-level steps to add tasks to the Activities tab in opportunities for a particular sales stage:

1. Define your task templates using the Manage Sales Task Templates task available from the Setup and Maintenance work area.
   - For more information, see the Setting Up Task Templates chapter in the Oracle Sales Cloud - Implementing Sales guide. The topic, Creating a Task Template: Procedure, has the steps.

2. Edit a sales stage and, in the Activity Templates area, associate the task template with a sales stage, as described in the procedure below.

**Adding Task Templates to Sales Stages**

Use the following procedure to add a task template to an opportunity sales stage.

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 Sales Methods and Sales Stages.
   - The Manage Sales Methods page appears.
3. Click the sales method whose sales stages you want to customize.
   - The Edit Sales Method page appears.
4. In the Edit Sales Method page, click the sales stage you want to configure. In the upper portion of the page, it’s assumed you would have already filled out the core information for the sales stage. For more information on these fields, see the topic, Configuring Sales Methods and Stages.
5. In the Activity Templates region, click the create icon.
6. Search for and select the task template you created earlier.
7. In the **Type** column, select **Automatically generated** as the type.
   - If you do not select Automatically generated, the associated tasks will not appear in the UI for users.
8. Save your changes.

**Note:** Task templates’ association with assessment templates is not supported for opportunity assessments in the simplified UI.
Setting Default Sales Method Profile Option

You can specify the sales method the application automatically applies to all newly created opportunities by setting the profile option Sales Method Default.

1. Sign in as a setup user or as the sales administrator and navigate to the Setup and Maintenance work area.
   
   The Setup page appears with an offering selected.

2. In the Setup page, select the Sales offering.
   
   The Setup: Sales page appears with a list of functional areas.

3. Select the Opportunities functional area.
   
   A list of required tasks for the Opportunities functional area is displayed.

4. Open the task Manage Opportunity Profile Options.
   
   The Manage Opportunity Profile Options page appears.

5. In the search region, select Opportunity Management as the application, or just enter the profile option name Sales Method Default directly in the Profile Display Name field.

6. In the search results list, click on the profile option name.

7. Set the profile option to the sales method you want to be the default for newly created opportunities.

Note: Opportunity and revenue reports and analytics are designed to work with the Standard Sales Process method supplied by Oracle. If you use other sales methods as the default sales method, then you may need to modify your reports.

Sales Statuses

Setting Up Sales Statuses

Opportunities and product lines on opportunities have statuses, such as Open, Won, or Lost. These statuses are part of larger status categories.

The application uses status categories when calculating business intelligence metrics for win/loss analysis. Status categories are not visible in the UI as statuses are.

To extend statuses, you can create new statuses, associating them with the existing status categories. You cannot add new status categories.
Predefined Sales Statuses and Categories

The application comes with four predefined sales statuses and status categories, as shown in the following table. Salespeople can select these statuses for an opportunity or for a product line while editing an opportunity. The application can set statuses automatically when synchronizing the opportunity header and its product lines.

<table>
<thead>
<tr>
<th>Status Code, Status, and Category</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Time between when a potential sales is realized and the customer decision on the sale is obtained</td>
</tr>
<tr>
<td>Won</td>
<td>Opportunity is closed with a buying decision from the customer and won over competitors, if any</td>
</tr>
<tr>
<td>Lost</td>
<td>Opportunity is closed without proceeding to a sale and lost to competitors, if any</td>
</tr>
<tr>
<td>No Sale</td>
<td>Opportunity is closed and not pursued</td>
</tr>
</tbody>
</table>

Customizing Sales Statuses

You can create new sales statuses or update existing ones, as long as you stay within the four predefined categories. You also can mark statuses as inactive or active. Inactive statuses do not display in the UI.

The following rules apply when creating new sales statuses:

- Statuses must belong to one of the predefined status categories.
- Status codes must be unique and cannot be null.
- The Status value must be unique and cannot be null.
- At least one active status in the Open status category must exist.

Oracle recommends that you retain the predefined status codes. As a best practice, if you want to extend statuses, create additional codes. Do not obsolete or replace existing status codes.

Use the following steps to customize sales statuses:

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 Sales Status.
   The Manage Sales Statuses page appears.
3. To add a new status: Click the Add icon and:
   a. Enter a new Status Code.
   b. Enter a new Status. This is the value that shows in the opportunity pages.
   c. Select the Active check box.
   d. Select from one of the predefined values for Status Category.
4. To modify an existing status, click in the row of the status so that it becomes editable and modify the values as you want.
5. Save your changes.
The following graphic shows the Manage Sales Statuses page with a new status added named "Abandoned".

![Manage Sales Statuses](image)

**Manage Sales Statuses**

**Sales Statuses**

<table>
<thead>
<tr>
<th>Status Code</th>
<th>Status</th>
<th>Active</th>
<th>Status Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABANDONED</td>
<td>Abandoned</td>
<td>✔</td>
<td>Lost</td>
<td>Custom status for abandoned</td>
</tr>
<tr>
<td>LOST</td>
<td>Lost</td>
<td>✔</td>
<td>Lost</td>
<td>Seeded Lost status for opportunity</td>
</tr>
<tr>
<td>NO_SALE</td>
<td>No Sale</td>
<td>✔</td>
<td>No sale</td>
<td>Seeded No Sale status for opportunity</td>
</tr>
<tr>
<td>OPEN</td>
<td>Open</td>
<td>✔</td>
<td>Open</td>
<td>Seeded Open status for opportunity</td>
</tr>
<tr>
<td>WON</td>
<td>Won</td>
<td>✔</td>
<td></td>
<td>Seeded Won status for opportunity</td>
</tr>
</tbody>
</table>

**Related Topics**

- Synchronization of Opportunity and Product Line Attributes: Explained

**What QBE values are supported in the Sales Status setup page?**

You can use only Y and N in the query by example (QBE) field located above the Active column in the Manage Sales Statuses page.

**Closing Opportunities**

**About Setting Up Opportunity Closing**

Salespeople can close an opportunity when the deal is either won, lost, or abandoned for some reason by setting the opportunity to a closed status.

The following figure shows a portion of Edit Opportunity page to illustrate the default application behavior:

- The application sets the close date to 20 days after the opportunity is created if you did not enter a different period in the Close Window field during sales method setup (callout 1).
When salespeople select one of the closed statuses (Won, Lost, or No Sale) (callout 2), they must enter a win or loss reason and a competitor (callouts 3 and 4).

By setting profile options, you can:

- Make the entry of the win or loss reason optional.
- Make the entry of the competitor optional.
- Set a different number of days for the default opportunity close date.

If you keep the default application behavior, then the setup user or another user with the Sales Administrator job role must create the list of competitors as described in the Setting Up Competitors chapter.

If you make the win or loss and competitor entry optional, the fields remain the Edit Opportunity page. You can use Application Composer to remove them.
Close Opportunity Page Save and Cancel Behavior: Explained

The Close Opportunity page follows specific behavior, as described in this topic.

Note: The Close Opportunity page, enabled by the profile option, Close Opportunity Flow Enabled, is available in the desktop UI only.

The following are the main points about the behavior of the Close Opportunity page:

- When salespeople enter the Close Opportunity page from the Edit Opportunity page, the application preserves any unsaved changes made to the opportunity.
- If a salesperson cancels changes after entering data in the Close Opportunity page, then the application rolls back any changes made to the opportunity after entering the close page. It returns to the Edit Opportunity page with the opportunity in the state it was in prior to entering the Close Opportunity page.
- When a salesperson clicks the OK button in the Close Opportunity page, the application preserves unsaved changes made after entering the close page. After salespeople return to the Edit Opportunity page, they must save the opportunity to commit changes made on both the edit and close pages.

Related Topics

- Closing an Opportunity: Explained
- Closing an Opportunity Using the Close Opportunity UI

Setting the Close Opportunity Profile Options

Using profile options discussed in this topic, you can configure close opportunity behavior.

Close Opportunity Profile Options

The following table shows the profile options that control opportunity close behavior.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Close Opportunity Win/Loss Reason Required</td>
<td>Yes</td>
<td>Determines whether, when closing an opportunity, the user is required to enter a win or loss reason. Applies both at the opportunity and revenue item levels.</td>
</tr>
<tr>
<td>Close Opportunity Competitor Required</td>
<td>Yes</td>
<td>Determines whether, when closing an opportunity, the user is required to enter a competitor. Applies both at the opportunity and revenue item levels.</td>
</tr>
<tr>
<td>Opportunity Close Date Default</td>
<td>20</td>
<td>Determines the number of days after an opportunity is created for the initial close date. If you want the application to show a blank close date when an opportunity is initially created, blank out any value in this profile.</td>
</tr>
</tbody>
</table>
### Setting the Profile Options

Use the following procedure to find and set the close opportunity profile options.

1. Sign in as a setup user or as the sales administrator and navigate to the Setup and Maintenance work area.
   The Setup page appears with an offering selected.
2. In the Setup page, select the Sales offering.
   The Setup: Sales page appears with a list of functional areas.
3. Select the Opportunities functional area.
   A list of required tasks for the Opportunities functional area is displayed.
4. Search for and select the Manage Opportunity Profile Options task.
   The Manage Opportunity Profile Options page appears.
5. In the search region, enter the profile option name in the Profile Display Name field.
6. Click Search.
7. In the list that is returned, click on the profile option name link.
8. Set the profile option value as needed.

### Data Security

**How Sales Users Gain Access to Opportunities: Explained**

This topic explains how the security reference implementation provided by Oracle determines who can access what opportunity information in your sales organization.

Whether or not you can access a particular opportunity depends on your membership in the resource and territory hierarchies. You can access an opportunity if:

- You create the opportunity.
- You are on the opportunity sales team.
- The opportunity owner or sales team member is your direct or indirect report in the resource hierarchy.
- You are the owner or are a member of the territory assigned to the opportunity.
- You are the owner or member of an ancestor territory of the territory assigned to the opportunity.
• You are assigned to a territory for the account associated with the opportunity.
• You are assigned to a territory that is an ancestor of the territory for the account associated with the opportunity.

Salespeople can see all opportunities related to their accounts. However, access differs between territory members and opportunity members:

• An opportunity owner gets full access to the opportunity, which includes the ability to edit as well as add and remove team members.
• Owners and members of territories or of ancestor territories assigned to the account of the opportunity get read-only access to the opportunity and are not added to the opportunity sales team.
• Owners and members of territories assigned to the opportunity product lines are added as a distinct list of territories to the opportunity sales team. Owners and members of these territories get full access to the opportunity. Depending on a profile option, either only the owner or all the members of the territory are added as resources to the opportunity sales team. Regardless of the access level for these members as a resource on the opportunity team, they always have full access.

Owners and members of ancestor territories of the territory assigned to the opportunity do not get added to the opportunity sales team but they always get full access.

The following figure illustrates some of the different ways you can gain access to an opportunity:

• Named agents in the diagram (A, B, and C) can access the opportunity.
• Unnamed agents (highlighted in yellow) cannot access the opportunity.
• Sales managers can access the opportunity because a salesperson in their management chain has access.
This figure shows who in a sales hierarchy can access an opportunity.

- Agent A can access the opportunity because she created it. When you create an opportunity, you are the initial owner.
- Agent B can access the opportunity because he is on the sales team.
- Agent C can access the opportunity because he is the owner of the NW territory.
- Sales managers who are higher up in the management chain can also see the opportunity because access is provided through the resource hierarchy. Agent C’s manager can access the opportunity information, but agent C’s colleagues cannot.
- Sales administrators can access the opportunity.
Note: Access using accounts is not shown in this figure.

Special Access
Some access is not affected by the management hierarchy and membership in sales teams or territories. This special access includes:

- Administrators: Users assigned the Sales Administrator job role get full access to opportunities and other objects. This access is based on their privileges, regardless of where the administrators are in the management hierarchy. Administrators do not have to be on the sales team or members of territories.
- Deal Protection: Salespeople assigned to an opportunity retain the sales credit on an opportunity even if they are moved to another opportunity.

Default Sales Channel

Default Sales Channel in Opportunities: Explained
The sales channel of an opportunity indicates whether the opportunity is being handled directly by an internal salesperson, or indirectly by an outside partner, such as a distributor or a reseller. You can define your territories to include sales channel, which will allow you to assign defined resources for each channel and to analyze your revenue by sales channel.

Sales Channel Support
You can set the sales channel at the opportunity header and revenue item levels. The application automatically applies the header value to revenue items when the status category matches.

Use the Manage Default Attributes for Partner Opportunities task to set the default sales channel. This setup allows the Lead Registration Type of a partner lead to determine the default sales channel on an opportunity once the lead registration is approved and converted into an opportunity. If partner functionality is not implemented, the application automatically sets the sales channel to Direct for all opportunities. Refer to the topic, Partner Lead Registration Type in Opportunities: Explained, for additional information.

Default Sales Channel During Opportunity Creation
If a salesperson creates an opportunity, because there is no partner and no lead registration type associated with the opportunity, the header-level sales channel is set to Direct. If the salesperson adds revenue items while creating the opportunity, the sales channel of the revenue lines is set to the same sales channel as the header.

If an opportunity is created from a lead conversion, it will not have a lead registration type, and the sales channel also will be set to Direct.

If an opportunity is created from an approved lead registration, the application uses the lead registration type to determine the appropriate header-level sales channel value. For example, an opportunity that originated from a Resale lead registration carries a default sales channel of Indirect (using the default configuration).

When a revenue item is added to an opportunity, the default value of the sales channel always matches the header-level value.
Note that if a lead registration is linked to an opportunity manually from the leads UI, the sales channel defaulting logic based on lead registration type does not apply.

## Opportunity Search

### Setting Opportunity Search Profile Options

Using profile options discussed in this topic, you can configure opportunity search behavior.

### Opportunity Search Profile Options

The following table shows the profile options that control opportunity search behavior.

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Default Value</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Require Additional Criteria for Opportunity Search Enabled</td>
<td>No</td>
<td>Determines whether additional search criteria, other than close date, is required when you want your search to:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Extend across all opportunities</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Rely on hierarchy rollups</td>
</tr>
<tr>
<td>Opportunity Number Search Enabled for Simplified UI</td>
<td>No</td>
<td>Enable opportunity search by Opportunity Number in the simplified UI.</td>
</tr>
<tr>
<td>Opportunity Search Close Period Default</td>
<td>Current Fiscal Quarter</td>
<td>Specify the default value displayed in the Close Period list of values in opportunity and revenue search.</td>
</tr>
<tr>
<td>Search Opportunity Filter Default</td>
<td>My Opportunities</td>
<td>Specify the default value displayed in the table filter in revenue search.</td>
</tr>
<tr>
<td>Opportunity Search Context-Based Data Security Enabled</td>
<td>No</td>
<td>Enable for improved performance of opportunity search.</td>
</tr>
<tr>
<td>Opportunity Search High Performance Data Security Wrapper Query Enabled</td>
<td>Yes</td>
<td>Enable SQL wrapper query on top of data security SQL predicates for improved performance of opportunity search. If disabled, use underlying data security SQL predicates.</td>
</tr>
<tr>
<td>Opportunity Search Panel Collapsed</td>
<td>Yes</td>
<td>Enable a collapsed view of opportunity search panel by default. Set to No to have default view as expanded.</td>
</tr>
</tbody>
</table>
Sorting Opportunity Searches by Last Update Date

From the simplified UI list page, you can sort the records returned from your opportunity search by setting the Enable Opportunity List Sort By Last Update Date profile option. By default, records on the Opportunity List are sorted by Win Probability and Opportunity Name. However, setting the Enable Opportunity List Sort By Last Update Date profile option value to Yes enables opportunities to be sorted by last updated date in descending order so that sales representatives can quickly review and action recently updated opportunities.

Setting the Profile Options

Use the procedure below to find and set the opportunity search profile options.

1. Sign in as the sales administrator and navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Opportunity Profile Options task.
   The Manage Opportunity 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.
7. Click Save.

Configuring Opportunity Close Period Search: Explained

When searching for opportunities, users have several opportunity fields on which to search. One of the fields is Close Period, which is a range based on opportunity close date. If the supplied opportunity Close Period search values don’t meet your business needs, you can add or remove the values that the user can see by modifying the opportunity lookup type, Close Period Values for Search. For example, you can configure the Close Period search so that users can pick all opportunities in the past 45 days, in the current year, in the next three quarters, or in the next three years. You can enable values that are not enabled by default, and you can add your own custom values.

Note that end users can search for an opportunity without any close date filter.

Use the following procedure to modify the lookup type:

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Standard Lookups task.
   The Manage Standard Lookups page appears.
3. In the Manage Standard Lookups page, search for the lookup type, Close Period Values for Search (MOO_OPTY_SRCH_CLS_PERIOD) and update the lookup codes as needed:
   - Use the Enabled to enable or disable a specific lookup code.
   - Update the meaning (display name), start date, end date, check box or display sequence of any of the predefined values.
   - Add or remove lookup codes, as long as they follow the correct lookup code formatting. See the following section, Behavior and Best Practices, for more information on properly formatted lookup codes.

Behavior and Best Practices

Typically, in your implementation, you will already have created and have in use the accounting calendar, also called the fiscal calendar. It’s important to note that the behavior of and best practices for the close period lookup type values are different depending on whether they reference standard Gregorian or accounting calendar lookup values.
The following table describes the differences for the lookup type MOO_OPTY_SRCH_CLS_PERIOD.

<table>
<thead>
<tr>
<th>Standard Gregorian Calendar Values</th>
<th>Fiscal/Accounting Calendar Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>The enabled Gregorian periods are displayed.</td>
<td>The enabled fiscal periods are displayed, in addition to the enabled Gregorian periods.</td>
</tr>
</tbody>
</table>

Supported periods are:
- Day
- Week
- Quarter
- Month
- Year

Supported periods are:
- Quarter
- Year

Lookup codes don't require a suffix. An example is: CURR_QTR: Current Quarter.

Fiscal period lookup codes must have the suffix _FSCL.
Predefined fiscal periods include the term “Fiscal” in the display name, for example, CURR_QTR_FSCL: Current Fiscal Quarter.

The following behavior and best practices are common to both types of calendars:

- Any close period lookup codes that aren’t in the correct format are not shown.
- When the accounting calendar and the close period setup don’t match (for instance, the accounting calendar is set up for a quarter, but the fiscal period is set to Next Month), then this close period value isn’t shown.
- When the default close period value or a value previously used in a saved search is disabled, then the close date range on that search is set to blank. End users can save the same search with a new value for future use, or they can restore the value, in which case the search would work as before.
- You can define a close period called "All" that includes a time span wide enough to view all open opportunities in one list, rather than viewing multiple lists for different periods.

Related Topics
- Creating the Accounting Calendar

Mass Update of Opportunities

Setting Up Mass Update of Opportunities

In Oracle Sales Cloud, the mass update feature lets salespeople update fields on multiple records at once. Setting up the feature for opportunities includes enabling the update action using Application Composer and, optionally, setting a profile option that controls how many records can be updated at once.

When mass updating opportunities, sales users can modify up to four fields per update. Access to the feature begins when the user selects the Update action in the Opportunities overview page, or list landing page. The fields that can be updated include:
- Budgeted
• Close Date
• Comments
• Currency
• Date Budget Available
• Estimated Deal Duration
• Include in Forecast
• Level of Risk
• Sales Stage
• Status
• Win Probability
• Win/Loss Reason

Custom fields are not candidates for the mass update feature.

Enabling the Update Action
Use the following procedure to add the Update action to the Opportunities overview 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 Opportunity 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 in the Opportunities landing page. Use the following procedure to test that your customization is working OK.

1. Sign in as a user who has access to opportunities, such as a salesperson, sales manager, or sales administrator.
2. In the Opportunities landing page, search for opportunities.
3. After you have a list of opportunities to work with, from the Actions menu, ensure that the **Update** action is available.

### Setting the Profile Option

The profile option Opportunity Mass Update Threshold Value (MOO_MASS_UPDATE_OPTY_THRESHOLD) controls how many opportunity 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 Opportunity Profile Options task.

   The Manage Opportunity 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
- Enabling Mass Update for Leads
- Applying Mass Update to Opportunities
- Oracle Sales Cloud - Customizing Sales guide
Chapter 18

Setting Up Opportunity Revenue

Setting Up Opportunity Revenue: Points to Consider

The sales opportunity revenue model allows several feature configuration options during and after implementation. For example, you can make some fields read-only and extend lookups to meet your unique business needs.

Revenue Amount and Revenue Type
Consider the following options about the Revenue Amount and Revenue Type fields:

- You may want to configure opportunities with Revenue Amount as a read-only field. This setup ensures that the revenue amount reconciles with quantity and estimated price. By default, the Revenue Amount is editable for cases where salespeople know a projected revenue amount but may not know the quantity. You can make the revenue amount read-only through customization. For more information on customizing applications, see the guide, Oracle Sales Cloud - Customizing Sales.

- Using Revenue Type, you can categorize revenue lines for grouping, sorting, and summarization purposes. The application comes with several predefined values, such as Pipeline, Upside, Expected, Committed, and Closed. Stored in the lookup MOO_REVENUE_TYPE, the values are extensible.

⚠️ Caution: You should avoid changing these values after users have begun using the application, as data integrity issues may result. If you do decide to obsolete existing values after the application is deployed, be sure to clean up the revenue records that refer to the obsolete values.

Product Selection
Consider the following options for product selection:

- To enable users to browse the sales catalog, you must set the profile option, Browse Sales Catalog in Opportunities Enabled (MOO_ENABLE_BROWSE_CATALOG), to Yes.

- The product and product group search screens and sales catalog filter by territory. This filtering limits the product selection to those products available in a salesperson’s territories. A check box in the product search pages lets salespeople turn off the filtering. For more information on this setup, see the topic, Configuring Sales Catalog Usage: Explained.

- The product and product group search screens contain the same values as those in the sales catalog, if implemented.

Sales Credit Assignment
Consider the following rules around sales credit assignment:

- To enable the Sales Credit icon in the opportunity products table, you must set the profile option, Opportunity Sales Credit Enabled (MOO_ENABLE_SALES_CREDITS) to Yes.

- The application automatically assigns the salesperson who added the product line to the opportunity one hundred percent of the sales revenue credit, and makes him the default sales credit recipient.

- Users need Full or Edit permissions to override the default sales credit recipient.
The territory assignment process can update credit recipients, unless they are locked in.

For more information on how salespeople assign sales credits in opportunities, see the guide, Oracle Sales Cloud - Using Sales. Also see the related setup topics for sales credits.

Business Units
Each product line is associated with a single business unit. The application uses the opportunity header business unit (which is based on the profile of the user who created the opportunity) to populate the default business unit on product lines. Business unit as a field is not displayed in the UI by default, but it can be exposed through customization.

- For more information on multiple business units in opportunities, see the topic, Multiple Business Units in Opportunities: Overview.
- For more information on customizing applications, see the guide, Oracle Sales Cloud - Customizing Sales.

Multi-Currency Support
Opportunities and product lines support multiple currencies, if multiple currencies have been implemented. When a salesperson adds a product or product group to an opportunity, the application uses the opportunity header currency as the default currency on the product line. However, salespeople can override the default currency. For more information on currency setup, see the topic, Setting Up Currencies: Overview.

Territory Assignment
When you’re using territory-based assignment, the assignment engine automatically assigns territories to product lines. Territory team members on the territories are assigned to product lines based on their membership in the territories. For more information on territory setup, see the topics on setting up territories.

Forecasted Revenue

Forecasted Revenue in Opportunities: Explained
The application includes opportunity revenue in the current sales forecast based on how the forecast criteria are set by the administrator. In the desktop UI opportunities, you can see which revenue items are included in the forecast and, if enabled by the administrator, include or exclude revenue from the forecast. In the simplified UI, you can include or exclude an entire opportunity, and thus its revenue from products, if enabled.

Understanding Forecasted Opportunity Revenue
You use the Edit Opportunity page revenue (or products) region to view which revenue items are in the current forecast. A check mark in the Forecast column of a revenue line means that the revenue will be included in the forecast the next time it is generated.

Note: A revenue item marked as forecasted does not necessarily mean that it is already included in the latest forecast. The inclusion is dependent upon when the refresh forecast process was last run. For example, a revenue item may meet the current forecasting criteria, but the latest forecast may have already been submitted when the revenue was added to the opportunity. When the next forecast snapshot is generated, the revenue item will be included, provided it continues to meet the forecast criteria.
Revenue is included in the forecast based on how the administrator has configured the forecast rules. Following is the behavior:

- Opportunity revenue can be systematically added to the forecast based on a set of global criteria specified during setup.
- **Include in Forecast** choice list:
  - The administrator can enable a choice list called **Include in Forecast**. The choice list appears in both the opportunity header and revenue (products) region.
  - In the Edit Opportunity page, you can override the criteria for an entire opportunity or for individual opportunity revenue items by using the **Include in Forecast** choice list.
- The application changes the **Include in Forecast** setting dynamically when you make changes to any of the following revenue attributes in the opportunity page. (The corresponding forecast is only updated upon save.)
  - Product Group
  - Quantity
  - Estimated Price
  - Revenue
  - Win Probability
  - Revenue Type
  - Expected Revenue
  - Status
- The application always includes in the forecast a revenue item that has been set to a status category of Won.

### Setting Opportunity Revenue Forecast Criteria

You can control opportunity revenue forecasting criteria and behavior by setting the following two sales forecasting fields:

- **Enable Forecast Criteria Override**: You can control the appearance and behavior of the **Include in Forecast** list of values in the Edit Opportunity header and revenue (products) region.
- **Forecasting criteria**: You can pick one of several different criteria for including revenue in the forecast. After you set criteria, the text, Forecast Criteria, along with the actual criteria, display in the revenue region.

You set these fields in the Select Forecasting Options page, **Unadjusted Forecast Criteria** region. This page is accessible by using the Setup and Maintenance task, Select Forecasting Options. For a procedure detailing how to create a forecast, see the topic, Creating a Forecast, in the Oracle Sales Cloud - Getting Started With Your Implementation guide.

### Setting Forecast Criteria

Use the following procedure to set forecast criteria:

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, Select Forecasting Options.
   - The Select Forecasting Options page appears.
3. In the **Unadjusted Forecast Criteria** region, set the criteria as you want.
   - The remaining sections in this topic describe the impact of setting the criteria fields for opportunity revenue lines.
For more information on the other forecasting setups not covered in this topic, see the help. Use keywords “forecasting” and “forecast”.

**Specifying Forecasting Criteria for Product Lines**

You can specify one of several different criteria by which opportunity product line revenue is included in the current forecast. Following are the supported criteria. All of the criteria are fields in the products region of the Edit Opportunity page.

- Estimated Price
- Expected Revenue
- Probability
- Product Group
- Quantity
- Revenue (amount)
- Revenue Type
- Status

**Impact of Enabling Forecast Criteria Override**

If you check the **Enable Forecast Criteria Override** field in the Select Forecasting Options page, then a choice list appears in the opportunity UI called **Include in Forecast**. The list appears both in the opportunity header area and the products region. Salespeople can use the field to manually add or remove revenue from the current forecast. If the choice list is enabled, salespeople can add revenue to the forecast even if the revenue does not fit the current forecast criteria. Additionally, the behavior in the opportunity UI changes depending upon whether you also have set up forecasting criteria (for example, if you have set up a win probability percentage that must be met before a revenue item gets included).

The following table explains the application behavior if you have set up forecasting criteria in the **Unadjusted Forecast Criteria** region in the Select Forecasting Options page.

<table>
<thead>
<tr>
<th>Enable Forecast Criteria Override Checked</th>
<th>Enable Forecast Criteria Override Unchecked</th>
<th>Forecast Criteria Text Appears in Opportunity UI</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Include in Forecast list of values displays in the UI, allowing sales personnel to select from the following options:</td>
<td>The Include in Forecast list of values does not appear. The default value for revenue items is When matches forecast criteria.</td>
<td>Yes</td>
</tr>
<tr>
<td>- Always</td>
<td>- Never</td>
<td>- When matches forecast criteria</td>
</tr>
</tbody>
</table>

The following table explains the application behavior if you have not set forecasting criteria in the **Unadjusted Forecast Criteria** region in the Select Forecasting Options page.

<table>
<thead>
<tr>
<th>Enable Forecast Criteria Override Checked</th>
<th>Enable Forecast Criteria Override Unchecked</th>
<th>Forecast Criteria Text Appears in Opportunity UI</th>
</tr>
</thead>
<tbody>
<tr>
<td>The Include in Forecast list of values displays in the UI, allowing sales personnel to select from the following options:</td>
<td>The Include in Forecast list of values does not appear. The default value for revenue items is When matches forecast criteria.</td>
<td>No</td>
</tr>
<tr>
<td>- Always</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Sales Credits

Sales Credits: Overview

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

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

There are two types of sales credit in opportunities:

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

Revenue Sales Credit

When assigning revenue sales credits, keep in mind:

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

Overlay Sales Credit

When assigning overlay sales credits, keep in mind:

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

*Note*: Territories with a Forecast Participation of Nonforecast are not eligible to be set as the forecast territory on either revenue or nonrevenue sales credits.
Customizing Default Assignment
You can customize the revenue territory assignment defaulting logic to meet your specific business needs for reporting and forecasting the product amounts on an opportunity. See the article, Customizing Credit Recipients and Forecast Territories Assignment (Doc. ID 2089301.1), available on My Oracle Support (support.oracle.com).

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

Related Topics
- Allocating Sales Credits: Procedures
- Sales Credit Recipient and Forecast Territory Defaulting Logic: Explained
- How can I lock in a sales credit recipient?
- Deal Protection on Opportunities: Explained

Enabling Sales Credits
To enable sales credit functionality in opportunities, you must set the profile option, Opportunity Sales Credit Enabled (MOO_ENABLE_SALES_CREDITS).

If the value of the profile option is Y, the Sales Credit column displays in the opportunity Products table, and the editable sales credit icon displays on product lines. The sales credits icon lets salespeople access the pages where they assign revenue and nonrevenue (overlay) sales credit to other users. For more information, see the related topics.

Prerequisites
Keep in mind the following prerequisites when salespeople assign sales credits in opportunities:
- Territories have been set up and your company is using territories for assignment of opportunity products.
- The user must have Full access to the opportunity in order to assign sales credits.

Setting the Sales Credit Profile Option
Use the following procedure to set the profile option.

1. As a sales administrator or a setup user, navigate to the Setup and Maintenance work area.
2. Search for and select the task, Manage Opportunity Profile Options.
   The Manage Opportunity Profile Options page appears.
3. In the search region, search for the profile option, Opportunity Sales Credit Enabled (MOO_ENABLE_SALES_CREDITS).
4. In the search results, click the profile option name.
5. Set the profile option value to Y.
6. Save your changes.

Related Topics
- Sales Credit Recipient and Forecast Territory Defaulting Logic: Explained
Recurring Products

Recurring Opportunity Products: Overview

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

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

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

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

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

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

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

Related Topics

- Working with Recurring Opportunity Products: Procedures
- Managing Recurring Revenue
Enabling Recurring Opportunity Products

To enable recurring opportunity products, use Oracle Application Composer to add the Schedule column to the opportunities UI.

For more information on recurring opportunity products functionality, see the related topics.

Adding the Schedule Column

In Application Composer, you add the Schedule column to the edit opportunity page. The schedule icon in the Schedule column is how end users access the recurring schedules pages. Use the following procedure.

> **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 into 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 **Opportunity**, then **Pages**. The Opportunity: Pages page appears.
6. In the Opportunity: Pages page, ensure that the **Simplified Pages** tab is active.
7. In the Details Page Layouts region, select the **Default Layout** in the table and then click the edit icon. The Details Layout: Default Layout page 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 Edit Revenue Table region, click the edit icon.
9. In the Details Layout: Default Layout: Edit Revenue Table page, find the **Schedule** field in the Configure Summary Table shuttle window. Move the field from the Available Fields window to the Selected Fields window.
10. Click **Save and Close**.
11. Click **Done** in the Details Layout: Default Layout page.
12. Validate the change by navigating to the edit opportunity page and ensuring that you can see the Schedule field in the Products table.

   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.
13. Publish the sandbox.
14. The Schedule field is now available to sales users in the edit opportunity simplified pages.

**Related Topics**

- Working with Recurring Opportunity Products: Procedures

Customizing Fields for Recurring Opportunity Products

You can add fields to the recurring schedules UI in opportunities. You can also rearrange the frequency values that salespeople can choose from when creating a recurring schedule.

For more information on recurring opportunity functionality, see the related topics.
Configuring Additional Fields
You can use Oracle Page Composer to enable additional fields in the recurring schedule UI, to meet your specific requirements.

The fields you can rename using Page Composer are:

- Expected Revenue
- Status
- Win Loss Reason
- Estimated Price
- Best Case
- Worst Case
- Win Probability
- Additional Number 1
- Additional Amount 1
- Additional Text 1
- Additional Text 2

Note: To perform this procedure, you must have already enabled the Schedule icon in the Products table in the Edit Opportunity page. For more information, see the topic, Enabling Recurring Opportunity Products.

To enable these fields:

1. Sign in as a setup user.
2. Navigate to **Sales - Opportunities**.
3. Create and activate a sandbox to work in.
4. Click your user name in the global area and select **Customize Work Area Pages**.
5. Select a customization layer. For example, you can make the changes available only to users with a specific job role, such as sales representatives. Click OK to commit the customization layer.
6. When customizing work areas, you start in the Design view. Design view lets you navigate to the component you want to customize.
7. Click on an opportunity to edit it.
   - The Edit Opportunity page appears.
8. Click the **Schedule** icon in the Products table.
   - The Manage Schedule page appears.
9. Click the **Select** button above the page.
10. Hover over the Transactions table header row, just to the right of the last column in the table, until a border appears. Click to the right of the border.
11. In the menu that appears, click **Edit Parent Component**.
   - The Component Properties window appears.
12. Click the **Children** tab.
13. Select the fields you want to enable.
14. Click **Close** to save.

You can use a similar procedure to customize the Set Schedule Page.
For more information on using Application Composer and Page Composer, see the Oracle Sales Cloud - Customizing Sales guide.

Customizing the Display Order of Frequencies

When salespeople create a recurring schedule, they must select a value, such as monthly, from the Frequency field. You can change the display order of the frequencies that display in the list. For example, you can make the Monthly value the first one in the list. You make these customizations by modifying the supplied lookup type, MOO_RECURRING_FREQUENCY.

Use the following procedure.

1. Sign in as a sales administrator or as a setup user.
2. Navigate to the Setup and Maintenance work area.
3. Search for and select the Manage Standard Lookups task.

   The Manage Standard Lookups page appears.

4. In the Lookup Type field, enter MOO_RECURRING_FREQUENCY and search. Or, you can enter Sales Recurring Revenue Frequency in the Meaning field and search.

5. In the list of values, re-order the items as needed by changing the numbering in the Display Sequence column.

   The value that has the lowest display sequence is the one that is set as the default value.

6. Click Save and Close.

Related Topics

• Working with Recurring Opportunity Products: Procedures
19 Setting Up Competitors

Sales Competitors: Overview

Use the Oracle Sales Cloud competitors pages to store information about the sales competition. As a sales administrator, you create the competitor profiles. Salespeople then can associate competitors with opportunities, associate product groups with competitors, and view competitor details.

The key features of managing competitors include the following:

- Competitor profile: Store several aspects of competitor companies, such as name, URL, threat level, and industries and geographies where the competitors are doing business.
- Internal experts: Associate with competitors people from your company who are considered experts about the associated competitor.
- Collateral: Attach relevant competitor documents. After you store them, salespeople can access the competitive collateral to position products or solutions against competitors.
- Products Groups: Track all product groups that a competitor is associated with and view customers buying competitor product groups. Sales administrators, sales managers, and sales representatives can associate product groups with the competitor using the Competitive Presence node in the desktop UI customer pages. Competitive presence provides information on product groups that your company currently sells or is interested in selling to the customer.
- Competitors in opportunities: Associate competitor information with opportunities, both at the opportunity level and at the product-line level. After salespeople associate a competitor with an opportunity, the competitor profile shows opportunities where the competitor is present.
- Notes: Create free-form notes about the competitor.
- Revenue at stake: The competitor profile displays revenue at stake, which is potential opportunity revenue where the competitor is present.
- Analytics and reports: Access several analytics and reports around competitor data, such as win/loss trends. For more information, refer to the Oracle Sales Cloud Creating and Administering Analytics guide.

Note: Depending on the setting of the profile option, Close Opportunity Competitor Required, salespeople may be required to enter a competitor when closing an opportunity. See the topic, Setting the Close Opportunity Profile Options, for more information.

Managing Sales Competitors: Procedures

Use the procedures in this topic as you create and maintain information on sales competitors.

Creating Competitors

Use the following procedure to create a competitor.

1. Sign in as the sales administrator and, from the Navigator, select Competitors. The Review Competitors page appears.
2. Select the Create icon, or select Create from the Actions menu. The Create Competitor page appears.

3. In the fields, enter or select values. The following table describes the fields.

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

4. When you’re finished entering the competitor details, click Save and Close or Save and Edit.

>Note: Upon saving, if you get an error that a matching company has been found in the application, then respond to the dialog box by either merging this record with the existing one or creating a new organization in the application.

In addition to performing the procedures in this topic, you can also associate product groups with competitors. The product groups then appear in the Product Groups tab in the Edit Competitor page for a specific competitor. The ability to
associate product groups with competitors is available only if the desktop UI customer center pages are available in your implementation. See the topic, Associating Competitors with Product Groups: Procedure, for more information.

Entering SWOT for a Competitor

You can assign strength, weakness, opportunity, and threat (SWOT) levels for competitors. Recording and reviewing SWOT levels helps you understand, plan, and craft an effective competitive strategy when facing a competitive threat on a deal.

Use the following procedure to enter SWOT for a competitor.

1. Sign in as the sales administrator and, from the Navigator, select Competitors. The Review Competitors page appears with a list of competitors.
2. In the list, select the name of the competitor. The Edit Competitor page appears.
3. In the SWOT table, add a new table row by clicking the add icon or selecting Add Row from the Actions menu.
4. In the new table row, select or enter the following values:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Indicates the type of SWOT value, such as a threat or weakness.</td>
</tr>
<tr>
<td>Description</td>
<td>Used to describe the type of SWOT.</td>
</tr>
<tr>
<td>Comments</td>
<td>Additional comments for the SWOT value.</td>
</tr>
</tbody>
</table>

5. Save your changes. The SWOT values are fully editable after you create them.

Viewing Competitor Opportunities

After salespeople associate a competitor with an opportunity while editing or closing it, the opportunities are automatically added to the competitor profile. The list of opportunities in a competitor’s profile is a consolidated view of past and current opportunities where the competitor is present. The opportunity data provides you with useful insight to plan appropriate sales strategies.

Use the following procedure to view competitor opportunities.

1. Sign in as the sales administrator and, from the Navigator, select Competitors. The Review Competitors page appears with a list of competitors.
2. In the list, select the name of the competitor. The Edit Competitor page appears.
3. Click the Opportunities tab. The Opportunities table shows all opportunities where the competitor is present.

Associating Attachments with a Competitor

You can attach files, free-form text, or URLs to a competitor record. Attachments let you provide additional details about the competitor.
Use the following procedure to attach files, text, or URLs to a competitor.

1. Sign in as the sales administrator and, from the Navigator, select **Competitors**.

   The Review Competitors page appears with a list of competitors.

2. In the list, select the name of the competitor.

   The Edit Competitor page appears.

3. Click the **Attachments** tab.

4. In the Attachments table, add a new table row by clicking the add icon or selecting **Add Row** from the Actions menu.

5. In the new table row, select or enter the following values:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type</td>
<td>Indicates the type of attachment, either a file, free-form text, or a URL.</td>
</tr>
<tr>
<td>File Name or URL</td>
<td>- If you selected File as the type, you can browse to the file on your computer.</td>
</tr>
<tr>
<td></td>
<td>- If you selected Text as the type, use to enter free-form text.</td>
</tr>
<tr>
<td></td>
<td>- If you selected URL as the type, use to enter the URL of the competitor’s web site.</td>
</tr>
<tr>
<td>Title</td>
<td>Title of the attachment.</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the attachment.</td>
</tr>
</tbody>
</table>

6. Save your changes.

**Associating Internal Experts with a Competitor**

Internal experts are people in your company who are experts on a competitor.

Use the following procedure to associate internal experts with a competitor.

1. Sign in as the sales administrator and, from the Navigator, select **Competitors**.

   The Review Competitors page appears with a list of competitors.

2. In the list, select the name of the competitor.

   The Edit Competitor page appears.

3. Click the **Internal Experts** tab.

4. In the Internal Experts table, add a new table row by clicking the add icon or selecting **Add Row** from the Actions menu.

   The Search and Select: Internal Expert dialog window appears.

5. Search for and select the person.

6. In the search dialog window, click **Apply** and then **Done**.

7. Save your changes. The table displays the details of the internal expert, such as his e-mail address and phone number.
Associating Geographies or Industries with a Competitor

You can associate geographical locations, such as a country, with a competitor in order to record this type of additional information about a competitor. The stored geographies are locations where the competitor is present. The available geographical locations are those that are defined in your application. You also can store the industries where the competitor competes with your company. The available industries are those that are defined in your application.

Use the following procedure to associate geographies or industries with a competitor.

1. Sign in as the sales administrator and, from the Navigator, select Competitors.
   The Review Competitors page appears with a list of competitors.
2. In the list, select the name of the competitor.
   The Edit Competitor page appears.
3. Click the Geographies tab. Or, if entering industries, click the Industries tab.
4. In the table, add a new table row by clicking the add icon or selecting Add Row from the Actions menu.
5. Search for and select the geographical location or industry.
6. In the search dialog window, click OK.
7. Save your changes.

Adding Notes to a Competitor Profile

You can add free-form notes to a competitor profile. Use the following procedure.

1. Sign in as the sales administrator and, from the Navigator, select Competitors.
   The Review Competitors page appears with a list of competitors.
2. In the list, select the name of the competitor.
   The Edit Competitor page appears.
3. In the contextual area of the page on the right, in the Notes area, click the create icon.
4. Enter the free-form note and save your changes.

Related Topics

• Sales Competitors: Explained

Associating Competitors with Product Groups: Procedure

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

Use the following procedure.

1. Sign in as a sales user, such as a sales representative or sales manager. Or, sign in as a sales administrator.
2. Navigate to Sales - Accounts.
   The list of accounts displays.
3. Select an account.
4. From the Actions menu, select **More Details**.
   The Edit Account page appears.

   ✏️ **Note:** If you do not have the More Details option available in the Actions menu, then the desktop UI customer center pages have not been enabled.

5. Click the **Competitive Presence** node in the Edit Account page.
   The Competitive Presence page appears for the account, showing the available catalogs on the left and the product groups on the right.

6. Select a catalog.

7. In the list of product groups, select a product group and then select the competitor you want to associate with the product group.

8. Optionally, enter any lost revenue you want to associate with the product group.

9. Save your changes.

10. In the Edit Competitor page, in the Product Groups tab, the product groups now show up as associated with the competitor.

### Enabling Competitors on Opportunity Product Lines

To enable competitors at the product line level in opportunities, use Oracle Application Composer to add the Competitors column to the opportunities UI.

For more information on competitors functionality, see the related topics.

Use the following procedure to add the Competitors column to the opportunity Products table.

1. Sign into 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.
6. In the Opportunity: Pages page, ensure that the **Simplified Pages** tab is active.
7. In the Details Page Layouts region, select the **Default Layout** in the table and then click the edit icon. The Details Layout: Default Layout page 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 Edit Revenue Table region, click the edit icon.
9. In the Details Layout: Default Layout: Edit Revenue Table, find the **Competitor** field in the Configure Summary Table shuttle window. Move the field from the Available Fields window to the Selected Fields window.

   ✏️ **Note:** Note that you will see two Competitor fields in the list. Hover over the first one and ensure the hover text reads **PrCmptPartyId**. This selection ensures that the Competitor field is editable, thus allowing users to select different competitors for different product lines. If you don't want users to be able to set different competitors on product lines, then enable the other Competitor field (with the hover text **Party Name1**).
10. Click **Save and Close**.
11. Validate the change by navigating to the edit opportunity page and ensuring that you can see the Competitor field in the Products table.
12. Publish the sandbox.
13. The Competitor field is now available to end users in the Products table in the opportunity simplified pages.

**Related Topics**

- Sales Competitors: Explained
- Associating Competitors with Opportunities: Procedures
20 Setting Up Assessments

Assessments: Overview

Assessments let salespeople evaluate the condition of a business object, such as an opportunity or lead. Administrators define assessment templates that consist of questions with scored responses and then make the assessments available in the applications. During the assessment process, the salesperson is presented with assessment questions. Responding to the questions provides the salesperson with immediate scoring and recommendations or follow-up business processes.

Assessments can consist of the following components:

- Questions
- Question ratings
- Responses, including free-form responses
- Scoring of the assessment
- Tasks to be performed based on feedback score

Initial Tasks for Assessments

Creating Assessment Templates: Procedure

You can use assessment templates to analyze the condition of your business objects, such as opportunities or leads. This topic explains the various tasks involved in creating an assessment template.

The following table lists the business objects that support assessment templates, along with the setup task that you must use to create templates for each object.

<table>
<thead>
<tr>
<th>Business Object</th>
<th>Task Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts</td>
<td>Manage Customer Center Assessment Template</td>
</tr>
<tr>
<td>Opportunities</td>
<td>Manage Opportunity Assessment Templates</td>
</tr>
<tr>
<td>Leads</td>
<td>Manage Sales Lead Assessment Template</td>
</tr>
</tbody>
</table>

Note: In this topic, the Opportunity business object is used as an example. However, the procedure to create assessment templates is the same for all objects.

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 and select the Manage Opportunity Assessment Templates task.
An assessment template page appears. For example, the Manage Opportunity Assessment Templates page appears.

**Entering Assessment Template Basic Details**

To create an assessment template for a business object, start by entering the basic details:

1. In the relevant business object’s assessment template page, click the **Create** icon.
2. In the assessment template details page, enter the following details:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a name for the template.</td>
<td>Discount Eligibility</td>
</tr>
<tr>
<td>Template Type</td>
<td>Select the type of template that you want to create.</td>
<td>Opportunity</td>
</tr>
</tbody>
</table>

**Note:** The template type options will vary depending on the object that you are creating the template for. For example, if you are creating an assessment template for opportunities, only the template types meant for opportunities, such as Opportunity, Opportunity Product, and Opportunity Contact are visible.

<table>
<thead>
<tr>
<th>Template Set</th>
<th>Select the template set.</th>
<th>Common Set</th>
</tr>
</thead>
<tbody>
<tr>
<td>A template set is a reference data set that contains one or more business units (BUs). Selecting the template set ensures that the template is available for use only to those BUs that are part of this template set.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Note:** Selecting Common Set makes the template available for all BUs.

<table>
<thead>
<tr>
<th>Description</th>
<th>Optionally, provide a description.</th>
<th>Discount eligibility assessment.</th>
</tr>
</thead>
</table>

3. Add attachments if there is any information that might help the salesperson. For example, add a .pdf file that contains information that might be helpful.

4. Click **Next**.

The Configure Ratings page appears.

**Configuring Ratings**

Ratings group question responses in a template into different categories. There are three predefined ratings: Poor, Average, and Excellent. You can add your own ratings or modify the predefined ratings.

To add a rating:

1. Click the **Add Row** icon and enter **Text** and **Description**.
2. Click **Next**.

The Enter Questions and Responses page appears.
To modify a rating, just replace the text in the Text field.

Entering Questions and Responses
In this step, you create questions and responses, and also set a rating for each of the question responses.

The score range for ratings is derived automatically in the next step of the assessment template creation process based on the rating you set here.

To create questions and responses:

1. Click the Create icon and select Create Question Group.

   Note: All questions must be part of a question group.

2. In the Create Question Group dialog box, enter Name and Description. For example, enter Deal and Question group for deals respectively.

3. Click Save and Close.

4. Click the Create icon and select Create Question.

5. In the Create Question dialog box, enter details as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Question</td>
<td>Enter a question that you want in the assessment template.</td>
<td>How soon will the implementation start?</td>
</tr>
<tr>
<td>Question Group</td>
<td>Select the question group to which this question should belong.</td>
<td>Opportunity Question Group</td>
</tr>
</tbody>
</table>
| Weight      | Enter the weight for this question. Weight determines the relative importance of a question within the assessment template. The higher the weight for a question, the more important this question is compared to the other questions in the template. The sum of weights for all questions in a template must be 100. | 50

   Note: This indicates that this question has 50% importance compared to other questions in the template.

   Note: You can also enter the weight in a later step, or even edit what you have entered here in a later step.

| Description | Optionally, provide a description. | |

6. Click Save and Close.

   Note: In the Question Details section, select the Include Free-Form Response Option check box only if you have a question that supports a free form response. Selecting this option adds a default response in the Possible Responses section. Free-form responses are recorded as comments in consuming applications, and they are not scored.
7. In the **Possible Responses** section, click the **Add** icon.

8. Enter details as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Response</td>
<td>Enter a response that the user can select for this question.</td>
</tr>
<tr>
<td>Score</td>
<td>Add the score that you want to allocate to each of these responses.</td>
</tr>
</tbody>
</table>
| Normalized Score | This appears automatically once you fill in the score.  
|                | The response that has the highest score gets a 100%. |
| Rating         | Define the rating that you want to assign to each of the responses. |
| Description    | Optionally, provide a description. |

Here’s an example of the possible responses:

<table>
<thead>
<tr>
<th>Response</th>
<th>Score</th>
<th>Normalized Score</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>0 to 3 months</td>
<td>5</td>
<td>25</td>
<td>Poor</td>
</tr>
<tr>
<td>4 to 6 months</td>
<td>10</td>
<td>50</td>
<td>Average</td>
</tr>
<tr>
<td>7 to 12 months</td>
<td>15</td>
<td>75</td>
<td>Good</td>
</tr>
<tr>
<td>&gt; 1 year</td>
<td>20</td>
<td>100</td>
<td>Excellent</td>
</tr>
</tbody>
</table>

9. Similarly, create all the questions that you want to include in this template along with the possible responses.

10. Click **Next**. The Edit Question Weights page appears.

**Editing Question Weights**

You can use this page to verify the weights that you entered for all the questions in the previous step. Check whether the weight total aggregates to 100. If not, you must update the weights to reach a total of 100. You can also use this page to edit the weights of questions.

Click **Next**. The Configure Score Range Attributes page appears.

**Configuring Score Range Attributes**

Depending on the scoring to response mapping in the questions and responses that you entered earlier, score ranges for ratings are automatically derived here. You can select the **Override score ranges** check box to edit the automatically derived score ranges and set different start and end scores for the ratings. You can modify the colors shown in the various score ranges.
Based on the assessment score, feedback can be displayed for the assessment in the consuming application, such as in opportunities. To provide feedback, enter the feedback in the Feedback field. For example, if the score is 95 and it maps to Excellent as rating, you could enter feedback such as Qualified for discount pending manager approval.

Click Save and Close.

You have now completed creating your assessment template.

**Additional Implementation Steps**

Once your assessment template is ready, you might have to perform some additional implementation steps before the template is available for the user.

For opportunities, you must attach the template to a sales stage within a sales method:

1. Navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Sales Methods and Sales Stages task.
3. In the Manage Sales Methods page, create or edit a sales method, and then add or edit sales stages.
4. In the Create or Edit Sales Stage page, navigate to the Assessment Templates region.
5. Click Add.
6. Search for the template you want to associate with the sales stage and add the template.

When an opportunity is in the relevant sales stage, the sales representative can use the associated assessment templates from the Assessments subtab.

**Related Topics**

- Configuring Sales Methods and Stages

**Implementation Concepts for Assessments**

**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.

**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.

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.
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.

**Opportunity Assessments**
Setting Up Opportunity Assessments: Points to Consider

When setting up and maintaining opportunity assessment templates, consider the implementation points described in this topic.

You can find a procedure describing how to set up assessment templates in Oracle Sales Cloud in the topic, Creating Assessment Templates: Procedure.

Setup Task for Opportunity Assessments

In the Setup and Maintenance work area, the setup task for implementing opportunity assessments is Manage Opportunity Assessment Templates.

Assessments Added to Sales Stages

Assessments are available to sales users only after you create an assessment template and then add the assessment template to a sales stage within an opportunity sales method.

Note: Assessment templates associated with an assessment template subtype are not supported for opportunities in the simplified UI. Therefore, when setting up an assessment template to be used in opportunities in the simplified UI, leave the Subtype field blank. For more information, see the section below, Assessment Template Types and Different Uls.

Mandatory and Recommended Assessments

When adding an assessment to a sales stage, you can mark the assessment as mandatory to be completed for the sales stage. In this case, the user must complete the assessment before moving the opportunity to the next sales stage. If you mark a template as recommended for a sales stage, the user is not required to complete the assessment before moving to the next sales stage.

Opportunity Access Levels for Assessments

The actions that end users can perform with opportunity assessments depend on the users’ access levels on an opportunity. The following table shows the access levels and actions.

<table>
<thead>
<tr>
<th>Access Level</th>
<th>Allowable Actions</th>
</tr>
</thead>
</table>
| View Only    | • View assessments in read-only mode  
               • Cannot add assessments |
| Edit or Full | • Add assessments  
               • Edit assessments  
               • Delete assessments (if enabled) |

Assessment Template Types and Different Uls

In the desktop UI, when creating assessment templates, you can create templates of several types, including:

- Opportunity
- Opportunity Competitor (subtype)
- Opportunity Product (subtype)
- Opportunity Contact (subtype)
Note: While the subtype templates (competitor, product, and contact) are fully supported in the desktop UI, they are not supported in the simplified UI. For upgrading customers with legacy assessments made available to users before an upgrade, these appear in the simplified UI as follows:

- Add Assessment dialog box: The subtypes do not appear in the Add Assessments dialog box.
- Show filter: The subtypes do appear in the Show filter that lets users pick from different assessments.

Allowing Users to Delete Assessments
You may want to enable the Delete Assessment button in the Assessments page in the simplified UI, so that salespeople can remove an assessment and start over or remove an assessment that’s no longer required.

You use Application Composer to add the Delete Assessments button. See the Oracle Sales Cloud - Customizing Sales guide for procedures.

Associating Assessment Templates With Task Templates
While creating an assessment template, you can associate a task template with the assessment template. Task templates contain tasks that the user is to perform; the tasks can be required or optional. See the topics on task templates setup for more information.

Note: Task templates’ association with assessment templates is not supported for opportunity assessments in the simplified UI.

Lead Assessments

Lead Assessments: Explained
This topic outlines how lead assessment templates enable a uniform assessment implementation across leads for your organization. Assessment templates provide guidance to sales resources to move the leads further along the sales cycle. Using the lead assessment feature, you can:

- Define Lead Assessments Templates
- Associate Task Templates to Assessment Templates
- Assess Leads

Define Lead Assessments Templates
You can define assessment templates to include assessment questions that represent industry best practices, sales methodologies, or a combination of both. As you enter the different responses to the questions, an assessment progress bar provides immediate rating and feedback based on the assessment definition. You can also use assessment templates to standardize lead follow-up procedures. Lead assessment templates enable consistent and predictable assessment for all leads for your business unit.

Associate Task Templates to Assessment Templates
An additional component to the assessment is the ability to recommend additional tasks based on the assessment results. If task templates are associated to the assessment, a list of recommended task templates is presented to you based on the assessment’s overall score. If applied, the tasks are added to the lead to support collaborative lead follow-up activities.
Assess Leads
Lead assessment is typically done as part of a lead follow-up activity where the lead continues to be progressed after the lead is qualified. The Lead Assessment Enabled profile option must be set by your administrator to display the Assessments tab in the Edit Lead user interface. If enabled, you can view the sets of predefined questions and answers collected to assist in evaluating the lead and perform the following actions from the lead’s Assessment tab:

- Perform New Assessments
- Edit Assessments
- Remove Incomplete Assessments
- Reassess
- View Historical Performance

Related Topics
- What’s the difference between lead qualification and lead assessment?

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>
<tr>
<td>31</td>
<td>60</td>
<td>Warm</td>
<td>Yellow</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.

<table>
<thead>
<tr>
<th>Minimum Score</th>
<th>Maximum Score</th>
<th>Rank Name</th>
<th>Color</th>
</tr>
</thead>
<tbody>
<tr>
<td>61</td>
<td>100</td>
<td>Hot</td>
<td>Red</td>
</tr>
</tbody>
</table>
21 Setting Up Task Templates

Task Templates: Explained

By creating task templates, you can present groups of tasks for salespeople working sales deals. For example, you can create an opportunity task template that displays a set of tasks that need to be performed while working an opportunity. The tasks generated from the templates are accessible to salespeople in the Activities tab within the applicable sales business object work area.

You can create task templates for the following sales business objects:

- Opportunity
- Lead
- Campaign
- Customer

Task templates have such attributes as name, status, type and subtype. Task templates can be striped by business unit in a multiple-business-unit implementation, allowing you to have templates available only to a single set of users.

Related Topics

- Creating Tasks from a Task Template: Procedure

Initial Tasks for Task Templates

Creating a Task Template: Procedure

When you create task templates, you first create a task template and then you create the individual tasks.

To get started, you’ll search for the appropriate task template setup task in the Setup and Maintenance work area. The following table lists the task template tasks for the supported business objects.

<table>
<thead>
<tr>
<th>Business Object</th>
<th>Setup Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity</td>
<td>Manage Sales Task Templates</td>
</tr>
<tr>
<td>Lead</td>
<td>Manage Sales Lead Task Template</td>
</tr>
<tr>
<td>Campaign</td>
<td>Manage Marketing Campaign Task Template</td>
</tr>
<tr>
<td>Customer</td>
<td>Manage Customer Center Task Template</td>
</tr>
</tbody>
</table>
Use the following procedure to create a task template.

> Note: In this procedure, the opportunity business object is used as an example. However, the procedure to create task templates is the same for all objects.

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Sales Task Templates task.
   - The Manage Sales Task Templates page appears.
3. In the Task Template section, click the Add icon.
   - The Create Template dialog box appears.
4. Enter the following in the Create Template dialog box:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template Name</td>
<td>Enter the name of the template.</td>
<td>Sales Coach</td>
</tr>
<tr>
<td>Description Template Set</td>
<td>Enter a brief description about the template name, if required.</td>
<td></td>
</tr>
<tr>
<td>Active</td>
<td>Indicates that the template is active. The check box is selected by default.</td>
<td></td>
</tr>
<tr>
<td>Template Type</td>
<td>The business object to which the task template is associated is set as default.</td>
<td>Opportunity</td>
</tr>
<tr>
<td>Subtype</td>
<td>The default value is blank. If you want to create a task template for assessment you must select Assessment. Otherwise, leave the field blank.</td>
<td></td>
</tr>
<tr>
<td>Template Set</td>
<td>Select the template set (Set ID) that you want to associate with your business unit.</td>
<td>Common Set</td>
</tr>
</tbody>
</table>

5. Click OK.
   - The task template is created.
6. To create tasks for the task template, click the Create icon in the Details section.
   - The Create Task dialog appears.
7. Enter the following in the Create Task dialog box:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject</td>
<td>Enter the subject of the task.</td>
<td>Check Service Requests</td>
</tr>
<tr>
<td>Description</td>
<td>(Optional) Describe the task.</td>
<td></td>
</tr>
<tr>
<td>Lead Time</td>
<td>(Optional) Enter the lead time for the task.</td>
<td>If you enter a lead time the task will begin after those many days. If a task is created from the task template on January 10, and</td>
</tr>
</tbody>
</table>
Field | Description | Example
--- | --- | ---
Type | (Optional) Select a type for the task. | Call, Chat, Demo, E-Mail, Meeting
Template Duration | (Optional) Define the due date for the task. The due date is calculated based on the template duration value and the task start date. If the duration is blank in the template task, the task is created without a due date. | If a task start date is January 12 and the template duration is set to 3, then the task due date is January 15.
Priority | (Optional) Select a priority for the task. | High, Medium, Low.

8. Click OK.

The task is created for that task template.

**Note:** After you create task templates, there may be additional steps needed for the tasks to display for end users. For example, with opportunities, you associate the task template with sales stages (see the topics for opportunity sales stages and sales methods setup for more information).

### Implementation Concepts for Task Templates

#### 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.

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>
<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.

Assessments Integration

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.

Related Topics
- Turning a Business Process into a Task Template: Example
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
- Setting Up Assessment Templates: Points to Consider
How can I create a task template that is available to associate with assessment templates?

Create the task template with a subtype of Assessment.
22 Setting Up Forecasting

Sales Forecasting Features: Overview

Forecasting future sales is a method of providing predictions of future revenue for specific time periods. Management uses sales forecast data to set production schedules and volumes, to determine resource requirements, and to report financial guidance to investors.

Summary of Features

The key features of sales forecasting include the following:

- Salespeople can view, manage, and submit their forecasts in the office and using the mobile application. Specifically, salespeople can:
  - Review their forecasted product items and submit the forecast.
  - View their unforecasted pipeline.
  - Use embedded analytics to improve forecast accuracy.

- You can view current, future, and past forecasts. The current forecast is open for editing at certain times and then frozen.

- Sales managers can review and adjust their forecasts wherever they are. They can view the latest forecasting data and compare it to key metrics such as pipeline and won revenue.

- Sales managers can quickly see which salespeople have submitted their forecasts, what has changed since the previous forecast, and the opportunities that comprise the forecast. Sales managers can also drill into their subordinates’ forecasts to view a forecast the same way that the salesperson sees it. This provides sales managers with the opportunity for more effective coaching and greater forecast accuracy.

- Sales managers can add, remove, or adjust individual lines in a salesperson’s forecast, segment the totals by time period, and override forecast totals for each salesperson. Any adjustments are clearly identified throughout the forecast hierarchy, allowing management to quickly view the changes made by sales managers on their team.

- Forecasting reflects any edits made to an opportunity, or any adjustments made at the deal level in real time.

- You forecast sales by territory. The forecasts roll up following the territory hierarchy. Changes to the active territory hierarchy are periodically synchronized with the forecast hierarchy up until a freeze date. After the territory freeze date, salespeople can make changes to their forecasts.

- You can record overlay forecasts on opportunity revenue transactions in addition to the revenue sales credit split. Overlay forecasts allow nonprimary salespeople to forecast sales expectations for all overlay sales credits.

- The forecast for a period is automatically generated from eligible opportunity product items scheduled to close within the period. Forecasts are refreshed from the pipeline revenue in real time. Opportunities and forecast items continue to synchronize until the salesperson submits forecast items for final approval.

- The sales administrator sets the criteria that determine whether a product item is eligible to be automatically included in a forecast.

- The sales administrator provides the option for salespeople to override the established criteria and manually include or exclude a product item from the forecast.
• If enabled, you can forecast by product for a territory, forecasting amount and quantity.

Initial Tasks for Forecasting

Implementing Forecasting: Overview

Salespeople forecast sales by territory as well as by individual salesperson or other resources. The application generates forecasts from opportunities according to configured options. Revenue for opportunities with close dates that fall within a forecast time period is added into the forecast for that time period for the related territory and salespeople for that opportunity.

The implementation includes:

1. Configure territories.
2. Configure opportunities.
3. Select forecasting options.
4. Run the Due Date Check process to archive forecasts that have a due date in the past. Ensure the forecasting schedule is generated and has the correct due dates configured before scheduling this process. Recommendation is to schedule this process to be run daily after midnight.

**Tip:** When you schedule processes, add a notification in case the process has an error or warning.

5. Run the Refresh Forecast process. Recommendation is to schedule this process to be run daily after midnight. If opportunities were bulk loaded into the system, it may take some time to refresh the forecast with the new data. This process is run periodically to uptake the latest changes to the territory hierarchy and keep future unfrozen forecasts synchronized with the current opportunity data.

6. If you have enabled either the pipeline metric or the closed revenue metric, then you will need to schedule the Run the Refresh Revenue Metrics process to be run every 10 minutes. This will refresh the pipeline metrics visible to the user.

7. Enable the Forecast Analytics tab by selecting the reports you want to see in the tab. Search for Manage Forecast Graphs in Setup and Maintenance, or you can find it under the Define Sales Forecasting Lookups task list in Setup and Maintenance. Find the lookup type ZSF_FCST_GRAPHHS Forecast Graph Selector. Use the ZSF_GRAPH1 lookup code for the first graph, then ZSF_GRAPH2, and so on.

8. Configure custom embedded analytics graphs and add them to the lookups.

Generating Forecast Submission Windows and Setting Forecasting Options

You can set up sales forecasting to match your business practices by setting the different options on the Select Forecasting Options page. You can specify how far in advance and how frequently you forecast and generate the forecasting submission windows during which your sales organization can adjust forecasts using the Edit Forecast page, for example. You can also enter the criteria the application uses to determine which opportunities to include in a forecast and you can permit adjustments by product or by territory.
Select Forecasting Options Page Overview

The following table highlights the different regions on the Select Forecasting Options page shown in the figure and provides an overview of the entries described in detail in the sections that follow.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Region Name</th>
<th>Overview</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Forecast Period Parameters</td>
<td>Enter the parameters that the application uses to generate the dates for each forecast and the forecast submission windows.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>During each window, your sales organization can update the forecast for the current period. Usually this window starts right after the last forecasting call with sales management and ends just before the next one.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>At the end of each window, the application takes a snapshot of your organization's forecasts so the forecasts are ready for your call.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>When you click Submit, the generated submission windows are displayed in the Scheduled Forecasts region where you can adjust them to conform with your actual forecasting schedule.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The automatically generated submission windows are approximations only, so you must adjust the dates manually.</td>
</tr>
<tr>
<td>2</td>
<td>Unadjusted Forecast Criteria</td>
<td>Specify the criteria the application uses to determine which opportunities to include in the forecast.</td>
</tr>
<tr>
<td>3</td>
<td>Summary Tab</td>
<td>Specify if you want sales managers to adjust forecasts by product group or by territories. By default, managers can adjust forecasts by territories. Adjustment by product group is not available unless you enable the Products tab.</td>
</tr>
<tr>
<td>4</td>
<td>Metrics</td>
<td>This region is used for setting options for specifying what metrics show up in legacy desktop UIs. These UIs are not available to new customers. New customers must use Application Composer to customize forecasting UIs.</td>
</tr>
<tr>
<td>5</td>
<td>Scheduled Forecasts</td>
<td>The application displays the generated forecast submission windows in this region. You must manually adjust the dates of each submission window as needed.</td>
</tr>
</tbody>
</table>
Creating the Forecast Submission Windows

You generate the forecast submission windows on your calendar by entering parameters in the Forecast Period Parameters region. Each submission window controls application behavior. The following figure shows submission windows at the beginning of each month. Each submission window:

- Starts on a Territory Freeze Date (indicated by callout 1 in the figure)
- Ends on the forecast Due Date (callout 2)

Before each freeze date:

- The forecast is read only.
• Changes to the territory and product hierarchy are synchronized to the forecast.
• Changes to revenue items are synchronized to forecast items.

After each freeze date:
• Sales users can edit, adjust and submit forecasts.
• Changes to revenue items are synchronized to forecast items.
• Salespersons must adjust and submit their forecast between the Territory Freeze Date and the Due Date.

After sales representatives submit their forecasts, they cannot edit them, but the forecasts can be adjusted by managers. After the due date is reached, each forecast becomes read-only.

To generate the forecast submission windows:

1. In the Forecast Period Parameters region, enter the options that the application will use to generate forecasts and the approximate forecast submission windows.

The following figure shows the Forecast Period Parameters region on the Select Forecasting Options page.
The following table describes the options and suggested values for submitting monthly forecasts for the current quarter.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
<th>Suggested Values for Forecasting Monthly During the Quarter</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Forecast Period</strong></td>
<td>Typically a quarter. Each forecast includes only those opportunities set to close in the forecast period.</td>
<td>Select Quarter.</td>
</tr>
<tr>
<td><strong>Adjustment Period</strong></td>
<td>This read-only field displays the type of period you selected when you set up your accounting calendar. Typically and for Vision Corp. this is a month.</td>
<td>This field is not editable.</td>
</tr>
<tr>
<td><strong>Forecast Frequency</strong></td>
<td>Enter the number of submission windows you want to generate for each forecast period.</td>
<td>Because you are holding a forecasting call each month and there are three months in each quarter, enter 3.</td>
</tr>
<tr>
<td><strong>First Forecast Due Date</strong></td>
<td>The date you want the first submission window to end relative to the forecast period. The application takes the forecast snapshot at the end of the day.</td>
<td>If you want the first forecast submission window to end on the last day of the first month in each quarter, then enter 31 in the <strong>First Forecast Due Date</strong> field and select the <strong>After the forecast period start date</strong> option. The application generates the subsequent submission windows based on the number of days you enter here and in the <strong>Territory Freeze Date</strong> field, but because each calendar month has a different length, entering 31 generates submission windows with some overlap. During overlapping submission windows sales representatives and their managers see two forecast submission windows, but you can choose to ignore these overlaps or adjust the dates after you generate the scheduled forecasts. Forecasting periods can overlap and can have gaps, but any gaps result in periods where users cannot submit or edit their forecast.</td>
</tr>
<tr>
<td><strong>Territory Freeze Date</strong></td>
<td>The number of days before the end date that you want the submission window to start. Any sales territory changes after this freeze date are ignored and applied only to subsequent forecasting windows.</td>
<td>Because you want your forecast submission windows to start at the beginning of each month, enter 31.</td>
</tr>
</tbody>
</table>
Chapter 22
Implementing Sales

Setting Up Forecasting

2. Click **Submit**.
3. Dismiss any warning messages.
4. Click **Yes** on the confirmation message that your forecast generation process was submitted.

You are returned to the Setup and Maintenance work area while the forecast submission window generation is in process.

5. Click the **Select Forecasting Options** task link again.

The Select Forecasting Options page shows the status of the period generation process. The status does not refresh automatically, so you may have to click **Cancel** to return to the Setup and Maintenance work area and try again later.

When the process completes, the generated submission windows appear in the Scheduled Forecasts region. The windows will look similar to what’s included in the following table.

- **The Forecast Name**
  - The system-generated name for each submission window.
- **Start Date**
  - The start date of the forecasting period, the beginning of the quarter.
- **End Date**
  - The end date for the forecasting period, the end of the quarter.
- **Territory Freeze Date**
  - The start date for the forecast submission window.
- **Due Date**
  - The end date for the forecast submission window, the period when the sales organization can adjust forecasts. At the end of this date the application takes a snapshot of the forecast and opens a new window. The forecast is frozen on the due date regardless if users click the submit button. After the due date passes, the active forecast is marked as past, and the next forecast is marked as active.

<table>
<thead>
<tr>
<th>Forecast Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Territory Freeze Date</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q3-2015 -2015/08/01</td>
<td>7/1/2015</td>
<td>9/30/2015</td>
<td>7/1/2015</td>
<td>8/1/2015</td>
</tr>
</tbody>
</table>
### Setting Up Forecasting

<table>
<thead>
<tr>
<th>Forecast Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Territory Freeze Date</th>
<th>Due Date</th>
</tr>
</thead>
</table>

**Note:** If you are in the middle of a quarter, for example Q3, the application may only generate one or two scheduled forecasts for that quarter.

6. Because the periods are generated based on a fixed number of days you entered as parameters and the number of days in a month varies, you must modify the start and end dates of each submission window by entering new dates in the **Territory Freeze Date** and **Due Date** fields. You must not leave any gaps between dates if you want the sales organization to update their forecasts at any time.

**Note:** The application automatically generates new submission windows at the end of each quarter. You must continue to manually adjust these windows as they are generated.

7. Click **Submit** when you are done.

### Setting Forecasting Criteria

To set forecasting criteria:

1. In the Unadjusted Forecast Criteria region of the Forecast Options page, shown in the following figure, specify the opportunity win probability that will trigger inclusion of an opportunity in the forecast.

**Note:** By default, the win probability and close date are set at the opportunity level. If you want to forecast at the level of individual revenue lines, then you must expose the win probabilities for the lines in the Edit Opportunity page using Application Composer.

a. Select **Probability** from the first list. Although other criteria are available, you will want to forecast based on the opportunity win probability.

b. Select **Greater than or equal to** or another operator from the second list.

c. Enter the probability, for example, 70.

You may want to specify the probability that matches the default probability of the appropriate sales stage in your sales method. For example, if you want all opportunities in the Agreement sales stage or in a later sales
stage to be included, and the default win probability is 70 percent for that sales stage, then you want to enter 70.

2. Select the **Enable Forecast Criteria Override** option. Selecting this option makes it possible for salespeople or their managers to include or exclude an opportunity from a forecast regardless of its win probability by making a selection from the Include in Forecast list while editing an opportunity as shown in the following figure.

![Edit Opportunity: Virtualization Software Project: Summary](image)

If you do not want users to use this list, then you must hide this field on the opportunity UI by using Application Composer. Leaving the **Enable Forecast Criteria Override** option unselected, does not by itself prevent users from making a selection from the list.

**Note:** Even when you disable the **Include in Forecast** list, users can always edit an opportunity to exclude it from the forecast, for example, by entering a different win probability.

3. Leave the **Enable nonrevenue forecasting** option unselected unless you want to generate separate forecasts for overlay territories.

### Enabling Forecast Adjustments by Product

To enable forecast adjustments by product:

1. Select the **Enable Product Totals** option if you want to enable users to adjust forecasts by product rather than by territories (the default). Selecting this option displays the Products tab in the Edit Forecasts window where users can make the adjustments. See callout 1 in the figure at the beginning of this topic.

2. If you selected the option, then specify the number of sales catalog levels you want to edit in the Products tab, by making a selection from the Product Hierarchy Depth list. To improve usability, Oracle recommends setting the
depth to 1 unless there is a compelling business need to break the forecast out beyond the first level of the product group hierarchy.

**Product Tab**

- Enable Product Totals
- Product Hierarchy Depth 1

---

**Enabling Adjustment Notes and the Forecast Trend Graph**

The Forecasts landing page displays a Forecast Overview chart that compares your forecast with won revenue and open pipeline. It also displays a second bar chart that shows your forecast by time periods. If you enable the Quota metric, then the landing page displays a quota vs. forecast chart instead of the forecast by period. Your third option is the forecast trend graph to be the second chart. If enabled, sales managers can add notes about their adjustments when they adjust forecasts. To enable adjustment notes and the forecast trend graph:

1. Select **Enable Forecast Trend Graph** to replace the period bar graph, or the quota chart if you use quotas, with the forecast trend graph.

   For the displayed territory, forecast period, and type of forecast, the graph shows the following:
   - Current and past forecast snapshots
   - Won revenue trend
   - Quota

2. Select **Enable Adjustment Notes** to enable notes for adjustments. Sales managers can then add adjustment notes for each forecast item. They can also create and edit a single adjustment note for summary territory adjustments or a note for summary product adjustments.

---

**Implementing Unit Forecasting**

You can forecast by territory and amount, by product and amount, and by product and quantity of units. This topic explains the steps to implement unit forecasting.

Opportunity items often include quantity, price, and either a calculated amount from quantity and price or an entered amount. The opportunity items are aggregated into forecasts by close date in the following ways:

- The amounts are totaled for the time period and territory.
- The amounts are totaled for the time period and by product.
- The quantities are totaled for the time period and by product.

By default, only the amount (quantity times price) is forecasted. To forecast the quantity, complete the following steps:

1. In Setup and Maintenance, find and go to Manage Standard Lookups.
2. Search for the lookup type ORA_ZSF_SHOW_METRICS or the meaning **Forecast metric options**. Highlight the row containing this lookup type.
3. In the Lookup Codes region, find the lookup code ORA_QUANTITY and check the Enabled box.
4. Save and close.

   Quantity is enabled for the Products tab and can be edited in the Forecast Items tab.
5. In Select Forecasting Options, the Summary Tab region, select **Enable Product Totals**.

   The Edit Forecast page will include the Products tab.
6. Select the number of sales catalog levels you want to edit in the Product tab in the **Product Hierarchy Depth** field.
   Oracle recommends setting the depth to 1.

### How can I display my own graphs in Forecasting?

Business Intelligence reports provide graphs that you can embed in Forecasting. Add your graph names as lookup meanings in the lookup type Forecast Graph Selector. For the third lookup value use the lookup code ZSF_GRAPH3 and so on. Add a new profile option for each graph that provides the path to the graph as the value, and give the profile option the same name as the lookup code for the respective lookup value. See the profile option ZSF_GRAPH1 Sales Forecasting Graph 1 for an example.

### How can a salesperson adjust forecast items?

The administrator sets the profile option Enable Sales Representative Adjustments to yes. This option can’t be changed back to no in the future. A salesperson who owns a leaf-level revenue territory can then adjust forecast items. Also, a manager who drills down to a salesperson’s forecast can act as the salesperson and adjust the salesperson’s forecast items.

### Implementation Concepts for Forecasting

#### Sales Forecast Components: How They Work Together

A sales forecast for a territory encompasses a time period and sales opportunities that meet defined criteria. Salespeople submit their forecasts to their managers, who make any needed changes and in turn submit the forecasts to their managers.
The following figure shows the components for a territory forecast. Product items from opportunities form the original forecast. If the product item has multiple sales credits, then the product item is visible across multiple forecasts. Salespeople add adjustments to the forecast. Adjustments can be applied at a summary or item level.

<table>
<thead>
<tr>
<th>Original Forecast</th>
<th>Adjusted Forecast</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forecast Territory</td>
<td>Forecast Period</td>
</tr>
<tr>
<td>Criteria</td>
<td>Original Forecast</td>
</tr>
<tr>
<td></td>
<td>Adjustment</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunity</th>
<th>Product Item</th>
<th>Product Item Credit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Territory</td>
<td>Close Date</td>
<td>Match</td>
</tr>
<tr>
<td>Primary Territory</td>
<td>Close Date</td>
<td>Override</td>
</tr>
</tbody>
</table>

**Product Items**

The forecast territory must be correctly assigned for the product item to appear in the correct forecast.

A product item from an opportunity must have a designated close date that falls within the forecast period to be included in the forecast.

The criteria for the product item must match the criteria set for the forecast. For example, if the forecast criteria specify a win probability of greater than 75 percent, then a product item with a win probability of 80 percent is added to the forecast.

If the ability to override is enabled, then a salesperson can include a product item in the forecast even though it does not match the criteria, or exclude a product item that matches the criteria.

It is possible for managers to pull in forecast items as adjustments that do not match the close date or criteria and override conditions.

**Original Forecast**

The original forecast is the total of all product items that match the forecast criteria or that are included by overrides. All product items must have close dates within the forecast period.

Salespeople can add a positive or negative adjustment on top of the original forecast to form an adjusted forecast.
Managers and overlay credit recipients can pull in forecast items as adjustments that do not match the close date or criteria and override conditions. Also, managers and overlay credit recipients can drop items as adjustments, regardless of close date or match and override conditions.

Unadjusted Forecast Criteria: Explained

The administrator sets the forecasting criteria. The forecasting criteria determines what product items are automatically included in the sales forecast. The product item amounts add up to become the unadjusted forecast amount.

The forecast includes items when:

- The item close date falls within the forecast period.
- The item is assigned to a forecasted territory.
- The item is closed as won.
- You set the override for the forecast item to always include it in the forecast.
- The item matches the forecast criteria. For example, include in the forecast all product items with a win probability greater than 70 percent.

The forecast excludes items when:

- Items are closed as lost.
- When you set the override to never include an item in the forecast.

Logic

The logic joins each set criterion with AND. If two criteria are for the same attribute and use equals, then they are joined by OR.

For example, the criteria:

- Status = Open
- Status = WIP
- Product <> CRM
- Product <> ERP
- Win Probability > 20
- Win Probability < 80

Translates logically to:

- (Status = Open OR Status = WIP) AND
- Product <> CRM AND
- Product <> ERP AND
- Win Probability > 20 AND
- Win Probability < 80

Related Topics

- Setting Opportunity Revenue Forecast Criteria
Overlay Forecasting: Explained

Overlay resources who are not the owners of the primary territory can submit a forecast on the same revenue as the primary sales resource. The primary sales resource submits a revenue forecast, and the amount should be counted only once for the revenue forecast. The overlay resource submits an overlay forecast, counting the same revenue a second time.

If multiple overlay resources forecast the same deal, then the same revenue amount can be added to the overlay forecast many times. A primary resource for one territory can submit an overlay forecast for another territory, so the context of the territory determines if a user is submitting a revenue or an overlay forecast.

Users can submit both revenue and overlay forecasts. In this case, management often expects a certain ratio of revenue to overlay dollars. Management can further analyze any major discrepancy from the ratio. The overlay forecast is taken from the nonrevenue credit split within opportunities, and is closely associated with the nonrevenue quota goals set on the territory.

The administrator must enable overlay forecasting before salespeople can add to overlay forecasts.

Territories

You can designate territories as not able to be included in forecasts, or as forecastable for revenue, for nonrevenue, or for both.

An owner of a nonrevenue territory can’t access a revenue forecast, and an owner of a revenue territory can’t access an overlay forecast. However, when managing revenue, it’s possible to assign a revenue split to a nonrevenue territory or a nonrevenue split to a revenue territory.

Territory Freeze Date: Explained

Salespeople can begin forecasting activities on the territory freeze date. The territory hierarchy used for forecasts freezes on this date. Forecast rollups from territories to parent territories follow the frozen hierarchy until the forecast due date.

The territory hierarchy freezes at 12:00 AM server time on the day of the territory freeze date. Therefore, if you set the territory freeze date to today it’s immediately effective.

The primary territory for an opportunity can change due to territory realignment. The forecast item reflects this and other changes made to the opportunity both before and after the territory freeze date, up until the forecast item is locked. When you adjust Forecast items they become individually locked. When you perform a summary level forecast adjustment or submit your forecast your entire forecast is locked.

Following are related aspects of the territory freeze date:

- Freeze date changes
- Forecast submissions
- Territory changes

Freeze Date Changes

If the forecast is frozen and the administrator extends the freeze date, then all submitted forecasts are unsubmitted and all the forecasts are no longer frozen.

Forecast Submissions

Salespeople can submit their forecasts only after the territory freeze date and before the forecast due date.
Territory Changes
Territory hierarchy changes aren't reflected in the forecast hierarchy for frozen forecasts. Opportunity changes are not reflected in locked forecast items.

For forecast items that aren't locked, the following changes occur after the freeze date:

- When revenues move to newly added territories after the forecast is frozen, the forecast items don't move to the new territories because the new territories aren't added to the frozen forecast hierarchy.
- Forecast items are removed from deleted territories, provided both the source and destination territory forecasts are not submitted.
- When revenues move between territories, the forecast items do not move if either the source or destination territories are submitted.
- If revenues move between existing active territories due to territory definition changes, then forecast items also move.
- If revenues move between existing active territories due to revenue attribute changes, then forecast items also move.

Managing Forecasts for Others: Explained
A sales administrator has access to all forecasts. You can delegate someone on the territory team to take care of forecasting actions for that territory owner.

If, for example, a senior sales manager wants one person to update forecasts for everyone in her territory hierarchy, then for her territory she adds that person as a member of the territory team and selects the Forecast Delegate check box.

Finding and Viewing Forecasts
The administrator or delegate can search to find the territory forecast to be updated. You can search for past, current, and future forecasts. You can also save your favorite searches.

You can switch from card view to list view in the Forecasts page to make it easier to work with multiple forecasts. Use the icons next to the Export button.

Copying the Prior Forecast
Use the Copy Prior Forecast action to ignore the rolled up opportunity data and copy the numbers from the previously submitted forecast to the current forecast. The prior forecast included forecast items and adjustments, unless it in turn was copied. Your copy takes the total forecast numbers, including adjustments, and pastes them to your current forecast. These numbers overwrite any calculated totals from rolled up opportunity or adjustment data.

Forecasting: Available Metrics
Metrics provide calculated measures based on historical or current transactional data. Salespeople can refer to metrics when making forecasting decisions. Your administrator enables one or more metrics. Disabling a metric hides the metric from the user interface and speeds up the execution time for certain background processes.

The following table shows the available metrics and how they are calculated:
### Metric | Description
---|---
Best Case Forecast | The best case forecast metric is the sum of all best case revenue values for all forecast items in the forecast period. You can enter the best case revenue amount when you change the product line details in an opportunity.
Closed Revenue | The closed revenue metric is actual revenue for the target territory that was closed during the forecast period.
Estimated Adjustment | The estimated adjustment metric is the sum of the difference between estimated revenue and revenue for all transactions in the forecast period. Sales Predictor uses statistical analysis to provide the estimated revenue amounts based on historical sales for the product.
Expected Forecast | The expected forecast metric is the sum of all weighted revenue values for all forecast items in the forecast period. Weighted revenue is the revenue amount multiplied by the probability of the deal closing.
Likelihood to Buy Product | The likelihood to buy product metric reflects the percentage of confidence that a deal will close with the specified revenue on the specified close date. Sales prediction uses statistical analysis to provide the likelihood to buy product based on historical sales for the product.
Pipeline | The pipeline metric is the total revenue amount of all product lines where the Status category is Open, the primary territory is the target territory, and the close date lies in the forecast period. Unforecasted pipeline is the total revenue amount of all product lines without a corresponding forecast item, where the status category is Open, the primary territory is the target territory, and the close date lies in the forecast period.
Quota | The quota metric is the revenue target associated with the expected performance of a salesperson’s territory for a given forecast period.
Worst Case Forecast | The worst case forecast metric is the sum of all worst case revenue values for all forecast items in the forecast period. You can enter the worst case revenue amount when you change the product line details in an opportunity.

### Forecast Period Parameters: Examples
The sales administrator creates a forecast by setting and submitting period parameters and forecast criteria. The following example illustrates how the period parameter settings affect the forecasting dates.

**Scenario**

Your company holds monthly board meetings on 11th of every month where they review, among other things, sales forecasts for the next quarter. In preparation for these board meetings, the sales vice-president asked you to generate a monthly forecast which predicts sales for the next quarter.

On January 1, you configure a recurring monthly forecast with a due date of the 10th of every month by setting the due date to 80 days (21 days of January +28 Days of February +31 days of March) before the first forecast period start date, which is April 1. The end date of the forecast period will be June 30. You set the following forecast period parameters for the monthly board meeting forecast:

- Forecast Period: Quarter
• Frequency: Three
• Adjustment Period: Defaults to Fiscal Period as set in the calendar. In this example it is monthly.
• Due Date: 80 days before the first forecast period start date
• Territory Freeze Date: 5 days before the forecast due date

You will edit the individual due date and freeze date for one quarter where the calculated date doesn’t fall on the desired date.

The following table illustrates the forecast dates that result from these forecast period parameters:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Q2 January 10</th>
<th>Q2 February 10</th>
<th>Q2 March 10</th>
<th>Q3 April 10</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due Date</td>
<td>January 10</td>
<td>February 10</td>
<td>March 10</td>
<td>April 10</td>
</tr>
<tr>
<td>Territory Freeze Date</td>
<td>January 5</td>
<td>February 5</td>
<td>March 5</td>
<td>April 5</td>
</tr>
<tr>
<td>Start Date - End Date</td>
<td>4/1 to 6/30</td>
<td>4/1 to 6/30</td>
<td>4/1 to 6/30</td>
<td>7/1 to 9/30</td>
</tr>
</tbody>
</table>

 bö Note: The number of scheduled periods determines how far in advance the forecast schedule will extend measured in terms of the forecast period. If a period is quarterly, and the number of scheduled periods is four, the system will generate forecasts up to one year in advance.

What's an adjustment period?

The time period for which a salesperson can enter a summary adjustment to the forecast or enter an adjusted forecast is the adjustment period. The field Period Frequency in Manage Accounting Calendars sets the time periods for viewing forecast amounts and making adjustments. The period frequency is named Fiscal period for the Adjustment Period field in the Select Forecasting Options page.

When do I realign territories?

As a best practice, perform major territory realignments when no forecasting activities are open. Forecasting takes place after the territory freeze date set for the forecast and up to the forecast due date. If all leaf territory forecasts are submitted but the due date has not been reached, it is safe to make changes to territories.

Forecasting Processes

Forecast Processes: Explained

After you submit forecasting options, you must schedule the following processes to run periodically.

• Due Date Check
This short process archives forecasts that are now past their due dates and activates the next scheduled forecast. It should be run every night after midnight.

- **Refresh Forecast**

  This process updates current and future forecasts using the latest opportunity data. It also updates the forecast territory hierarchy from the latest active territories. Between the territory freeze date and the forecast due date, the forecast territory hierarchy remains frozen. Run this process once prior to the territory freeze date for each forecast period.

- **Refresh Forecast Items**

  Opportunities constantly change. This process quickly refreshes forecast items that may not be synchronized with the underlying opportunity data. It should be run every night after midnight.

- **Refresh Revenue Metrics**

  If you have enabled either the pipeline metric or the closed revenue metric, then you must schedule this process to run every 10 minutes. This process refreshes the pipeline metrics visible to the manager.

- **Compress Forecast Metrics**

  This process reduces space usage and improves performance by compressing precalculated metrics. You must schedule this process to run every 10 minutes.

Do not run the Generate Forecast process.

**Forecast Synchronization: Explained**

When a salesperson updates a product item in an opportunity, the unsubmitted, unadjusted forecast is automatically updated to reflect the change.

The updates include the following:

- Creating new forecast items for opportunities that meet forecast criteria
- Updating existing forecast items
- Removing forecast items that no longer meet forecast criteria

**Periodic Synchronization**

The periodic process Refresh Forecast updates the forecast hierarchy from the territory hierarchy for unfrozen forecasts nightly or as scheduled. When a salesperson’s forecast is past due, the periodic synchronization fully updates the next forecast that is now due.

**Update from Opportunity**

A salesperson submits a forecast and afterward changes an opportunity. The salesperson’s manager rejects the forecast to make it available for changes. By default, the forecast items aren’t synchronized with the opportunity that was changed after forecast submission and before the forecast was rejected. If the salesperson enables Refresh from Opportunity at the forecast level, then any changes from the opportunity appear immediately in the forecast.
23 Setting Up Predictions

Sales Prediction: Overview

Sales prediction features enable organizations to capture and leverage predictive sales intelligence. Predictive models analyze sales data to evaluate buying patterns. After the evaluation of model results, lead generation can be scheduled to disseminate lead recommendations to users. Each lead recommendation includes win likelihood, average expected revenue, and sales cycle duration.

Summary of Features

This table lists sales prediction features.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Predictive Analytical Reports</td>
<td>These reports provide sales analysts with a summary of the prediction model results. Additionally, reports on the dashboard provide overviews of model performance and leads adoption.</td>
</tr>
<tr>
<td>Predictive Model Learning</td>
<td>Model learning uncovers hidden customer buying patterns. Salespeople can replicate sales success using historical insight generated through model training.</td>
</tr>
<tr>
<td>Rule-based Recommendations</td>
<td>When new products are launched or during initial deployment, historical data is sparse. In such cases, the sales analyst can create customer-, industry-, or product-specific rules to drive the recommendation of new products.</td>
</tr>
<tr>
<td>Higher Lead Adoption Rate</td>
<td>By utilizing a combination of data mining, segmentation, prediction and business rules, sales prediction functionality ensures that the recommendations have a higher likelihood of being converted to a win.</td>
</tr>
<tr>
<td>Analyze Recommendation Performance</td>
<td>Built-in analytical reports verify whether the recommendations are being accepted by the sales organization. If adoption is low, then the predictive models can be fine-tuned by selecting different attributes for model learning or editing the rules. Simulation can then be performed to assess the impact of these new changes before publishing new recommendations.</td>
</tr>
<tr>
<td>Usage across Oracle Sales Cloud Service</td>
<td>The recommendations generated can be viewed when using other Sales Cloud capabilities such as managing customers and contacts. When reviewing customer details, recommended products display next to the customer with the rationale for the recommendation. Territory managers can use sales prediction metrics to set sales targets by territory and assign them to sales people. Metrics ranking also determines whether leads can be qualified during the lead qualification process.</td>
</tr>
</tbody>
</table>
Initial Tasks for Sales Predictions

Getting Started with Sales Prediction: Prerequisites

This topic describes the sales prediction user roles, and takes you through the sales prediction prerequisite tasks.

User Roles and Prerequisites

The following lists the sales prediction user roles:

- Sales Analyst: Identifies interesting sales trends and customer behavior insights useful to help the overall sales organization to target customers more effectively.
- Sales Administrator: Performs ongoing administrative tasks, corrects erroneous or incomplete data, and customizes the application according to business needs.

The following table lists the sales prediction prerequisite steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Task</th>
<th>Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Run attribute analysis report to identify quality of customer attributes.</td>
<td>Sales Analyst</td>
</tr>
<tr>
<td>2</td>
<td>Select model entities and attributes based on the attribute analysis report.</td>
<td>Sales Analyst</td>
</tr>
<tr>
<td>3</td>
<td>Select products suitable for recommendation.</td>
<td>Sales Analyst</td>
</tr>
<tr>
<td></td>
<td>Optional</td>
<td>Set configuration parameters.</td>
</tr>
</tbody>
</table>

The next sections describe the following steps:

- Running Attribute Analysis Report
- Selecting Entities and Attributes
- Selecting Products for Recommendation
- Setting Configuration Parameters

Running Attribute Analysis Report

You must understand the quality of your data to optimize results. Quality data that is well-populated and has good distribution of values ensures best results. If data quality is poor, you can still use it but you must take steps to improve data to maximize results.

Use the Attribute Analysis Report to obtain detailed data distribution and importance metrics for each attribute across entities. Based on the analysis report, select the most appropriate attributes for model training. Attributes that have fewer null values and higher importance are good candidates for predictions.
To run the attribute analysis report:

1. Sign in as a sales analyst.
2. Select **Sales**, then **Recommendations**.
   - The Customer Asset Analysis page appears.
3. Click the bi-directional arrows icon on the right to display the **Recommendations** page.
4. Click the **Perform Attribute Analysis** task under the **Models** heading.
   - The Perform Attribute Analysis page appears.
5. Click **Create** in the Scheduled and Completed region.
   - The Create Attribute Analysis Report page appears.
6. Enter details as required and click **Continue**.
   - The **Attribute Analysis Report** appears with detailed analysis and the importance of each attribute in the selected entities.

### Selecting Entities and Attributes

Sales prediction functionality generates model training results from historical sales data based on selected model entities and attributes. Based on the findings in the attribute analysis report and your expertise, you can select attributes from each entity that are important predictors for recommendations. You can add or remove attributes easily if the report determines that they add to the predictability of the recommendations.

For example, an entity like **Customer** may have two attributes of high data quality, residential address and annual income. Only if you have a high annual income, you can live in Palo Alto, CA. The analyst may choose to select one of many attributes that have the same impact on prediction to avoid redundancy.

To select entities and attributes:

1. Sign in as a sales analyst and navigate to the Recommendations page.
2. Click the **Select Entities and Attributes** task under the **Tools** heading.
   - The Select Entities and Attributes page appears.
3. Select the entities and attributes that you want to include for model training and rules.
   - To select attributes, click the respective entity and select attributes from the list of available attributes.
4. Click **Save and Close**.

### Selecting Products for Recommendation

In this step, you select the set of products that will be recommended to customers. Select products based on your organization’s business needs. For example, you may select products based on the sales performance of the past products or expected sales of new products according to the ones you want to promote at a given point. However, after you run model learning, from the set of recommendable products, only products that are relevant to a specific customer are recommended.

To select products:

1. Sign in as a sales analyst and navigate to the Recommendations page.
2. Click the **Select Products for Recommendation** task under the **Tools** heading.
   - The Select Products for Recommendation page appears.
3. Click **Add** under the Selected Products region.
   - The Browse Catalog page appears.
4. Search for and select the product groups or products for recommendation.
5. Click Submit under the Products for Recommendation heading.
   The Select Products for Recommendation page appears.
6. Click Done.

Setting Configuration Parameters
Sales prediction functionality contains a set of configuration parameters already preset with default values. You can edit these parameters to define how you want the application to function.

To set configuration parameters:
1. Sign in as the sales administrator and navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Recommendation Configuration Parameters task. The Manage Recommendation Configuration Parameters page appears.
3. Select the configuration parameter that you want to set, and click the Edit icon.
4. In the Edit Configuration Parameter popup window, set the desired value and click Save and Close.
5. In the Manage Recommendation Configuration Parameters page, click Done.

Implementation Concepts for Sales Predictions

Prediction Models or Prediction Rules: Critical Choices
This topic explains how you can leverage predictions based on either the predictive models or business prediction rules, or both, to generate sales leads for your company’s marketing functions. Simulating product recommendations also uses the model or prediction rules.

Predictive Models
Use the predictive models if you have existing product lines with enough historical opportunity revenue data that provide strong statistical correlations between customers and buying patterns for meaningful results. The predictive models find target customers for products and predict the estimated revenue and sales cycle by customer.

Prediction Rules
Set manual prediction rules if you have:
- New product offerings
- Little to no historical data
- Historical data available, but not prescriptive of future trends, based on sales and marketing insight
- Discontinuity in market trends so that the past is no longer an indication of the future (for example, economic, social, or political changes)

Analysts create prediction rules to support sales objectives. Oracle Business Intelligence analyzes the available historical data and provides metrics for a target product or product group.

Prediction rules can be formulated leveraging the analysis of the predictive models. For a given product with insufficient data, analysts can identify customers to target for similar products based on the analysis conducted for a corresponding, similar product. The insight gained from this analysis can augment the analysts’ and product experts’ knowledge of the sales
environment. Effectively, the evaluation of the predictive model can serve as a basis for prediction rule formulation and for the sales prediction metrics values made available to sales users.

Working with Sales Prediction Features

This topic helps you start working with sales prediction capabilities. It takes you through steps to analyze attributes, run model training, and generate leads.

Using Sales Prediction Features

Once the prerequisite tasks are complete, the sales analyst can perform the following tasks:

1. Schedule model training.
2. Analyze model training results.
3. Write prediction and eligibility rules.
4. Simulate product recommendation.
5. Generate leads.

Scheduling Model Training

After selecting products, you must schedule model training and check how the model training results look.

1. Click the **Train Model** task under the **Models** heading.
   The Train Model page appears.
2. Click **Create** in the Scheduled and Completed region.
   The **Create Predictive Model Training Process** page appears.
3. Enter details start and end dates, and click the **Continue** button.
4. Click **Submit**, and then click **OK**.
   The model training process is scheduled. View the table under the Scheduled and Completed region for the status of the process. Once the process is completed, model training results will be available for review.
   You can now analyze the predictive model to identify products that customers are most likely to buy.

Analyzing Predictive Models

1. Review the **Model Insight** on the Overview page and details of model results in the **Analyze Model Results** task.
2. You can identify the products with low likelihood to buy, expected revenue, or high time to close and decide whether you need to eliminate these products from the set of recommendable products or write rules to support them.
   These occurrences may be due to inaccurate or incomplete data and can be reviewed periodically.

Writing Rules

1. Click the **Manage Rules** task under the **Rules** heading.
2. Create prediction or eligibility rules to improve the quality of your recommendations.
   Eligibility rules are used to restrict products from being recommended due to situations such as lack of inventory, governmental restrictions, and so on.

   **Note:** Eligibility rules always override model results and prediction rules.
Simulating Product Recommendation

After you run model training and define rules, you can select a sub-set of customers and conduct a simulation.

1. Click the **Simulate Recommendations** task under the **Tools** heading to simulate recommendations.
2. Review the product recommendations for the selected customers and generate leads if the recommendations look accurate.

Generating Leads

When you are satisfied with the simulation results, generate leads:

1. Click the **Generate Leads** task under the **Leads** heading to generate leads.
   
   The Generate Leads page appears.
2. Click **Create** and fill the required fields in the Create Predictor Lead Generation Process page.
3. Click **Continue**, and then click **Submit**.
4. Click **OK** on the confirmation dialog box.
   
   On the Generate Leads page, you will see the report icon in the **View Report** column after the leads preview process has completed successfully.
5. Click the report icon for your lead.
   
   The Preview Leads page appears.
6. Preview the leads in the **Leads Report** region and select leads that you want to generate.
7. Click **Generate Leads**.
   
   Your leads are generated.

   Once you schedule leads, they will be available for other Sales Cloud capabilities such as managing opportunities and customers.

   **Note:** If you are customizing the Leads object and your organization is using sales prediction to generate leads, then you must set default values for any custom required fields on the Leads object. For example, the sales prediction engine does not generate values for custom required lead attributes. Therefore, to successfully use the lead generation feature to create leads, you must enter a default value for any customized Lead attribute which is marked as **Required**.

Sales Prediction Profile Options and Lookups: Explained

Sales prediction seed data, such as profile options and lookups, are configurable options that affect how the sales prediction feature operates. You can configure and control sales prediction application data centrally by managing profile options from the Setup and Maintenance work area. Lookups are lists of values in applications. You define a list of values as a lookup type consisting of a set of lookup codes.

**Sales Prediction Profile Options**

Profile options can be set at different levels, such as user, product, or site level. The application gives precedence to certain levels over others, when multiple levels are set. The allowed levels come preconfigured with the application. 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 product 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. The effect of setting each of the sales prediction profile options is described in the following table:

<table>
<thead>
<tr>
<th>Profile Option Display Name</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ignore Products that have no Closed Revenue</td>
<td>Enable the association model to ignore products that have no associated closed revenue lines.</td>
</tr>
<tr>
<td>Attribute Values Breakdown Displayed</td>
<td>Displays the top and bottom values for the selected attribute.</td>
</tr>
<tr>
<td>Confidence Display Threshold</td>
<td>Sets the confidence by a percentage value.</td>
</tr>
<tr>
<td>Number of Top Customer Attributes Displayed</td>
<td>Specify the number of attributes to be displayed in the bar graph for the selected product.</td>
</tr>
<tr>
<td>Customer Asset Date Range</td>
<td>Specify the default date range for the customer asset analysis report.</td>
</tr>
<tr>
<td>Number of Top Values Displayed for Selected Dimension</td>
<td>Specify the number of top values to be displayed for dimensions, such as Geography, Territory, or Industry.</td>
</tr>
<tr>
<td>Number of Top Installed Base Products by Dimension</td>
<td>Specify the number of top installed base products to be displayed for the selected dimension, such as Geography.</td>
</tr>
<tr>
<td>Top Attribute Values Displayed</td>
<td>Controls the number of slices in the data distribution values pie chart.</td>
</tr>
<tr>
<td>Display Model Recommendations</td>
<td>Enable model-based recommendations from Sales Predictor to be displayed in consuming applications.</td>
</tr>
<tr>
<td>Association Model Confidence Default</td>
<td>This parameter controls the default setting for Association Model confidence.</td>
</tr>
<tr>
<td>Association Model Lift Default</td>
<td>Controls the default lift setting for Oracle Data Mining ODM Association model.</td>
</tr>
<tr>
<td>Association Model Rule Support Default</td>
<td>Controls the default value for rule support.</td>
</tr>
<tr>
<td>Sales Predictor Leads Date Range</td>
<td>Displays the chart for the set number of historical days.</td>
</tr>
<tr>
<td>Lead Preview Report Displayed</td>
<td>Controls the display of lead preview report in a deployment.</td>
</tr>
</tbody>
</table>
| Number of Days to No Longer Display Rejected
  Recommendations                                   | Specify the number of days to no longer display recommendations that have been rejected by a salesperson. |

**Sales Prediction Lookups**

Lookups provide a means of validation and lists of values where valid values appear on a list with no duplicate values. The effect of setting the sales prediction lookup is described in the following table:
The following table displays the sales prediction lookup type, values, and description.

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Lookup Values</th>
<th>Description</th>
</tr>
</thead>
</table>
| Source for Recommended Products | • Manual  
Products for recommendation have been added manually.  
• Auto  
Products have been selected for recommendation based on model learning. | Products can be selected for recommendation through model learning or manual selection. |

**Related Topics**

- Profile Options: Explained
- Lookups: Explained

## Model Rule Entities and Attributes

### Rules Management: Explained

This topic explains how to manage prediction and eligibility rules efficiently.

#### Rule Types

Rules are of two types:

- Prediction rules
- Eligibility rules

#### Rule Folders

Rule folders enable you to logically group and manage multiple rules and rules sets. Rule folders allow you to manage your rules by campaigns, seasonal events, sales regions or any such logical grouping that relates to the context in which you are creating the rule. For example, you can create a folder for North American sales campaigns in which you can logically group any type of rule pertaining to campaigns for this region. You can group both prediction and eligibility rules within a rule folder. You can set a rule folder to test or production. A test folder allows you to create rules and view the impact in a test environment without impacting recommendations in consuming applications. When you are satisfied with the simulation results, you can change the status of the folder to Production and the prediction rules will immediately appear as recommendations in other applications. Only recommendations based on active rules within production folders are visible in other applications. Additionally, rule-based leads are generated using active rules within production folders.

#### Views: Rule Folders and Rules

You can choose what the search results display by selecting either Rule Folders or Rules view. Rule folders view is the default view where the search results display all the rule folders that exist. You can view all rules or rule folders that impact a product across prediction and eligibility rules.

You can search by the folder name in the Rules view to view all the rules that a folder contains. In the Rules view, you can also view and compare across both prediction and eligibility rule types satisfying a search criteria. For instance, you can view
all rules that specify conditions for a specific product. You can view the rule conditions in the Rules view and these conditions are also displayed in the Recommendations Rationale for the recommendation.

Sales Prediction Rules: Explained

This topic explains the types of rules used in sales prediction. Use rules to identify target customer segments for target products. The results provide salespeople with quality leads with the best products to sell to specific accounts.

Sales prediction features enable you to create two types of rules:

- Prediction rules
- Eligibility rules

Prediction Rules

Products with little or no past sales history, products that need to be promoted due to lack of demand, and products that must align with marketing initiatives are some of the situations where a company might create prediction rules. Many companies have product experts who have deep market and industry insight about the best customers they should target for their products. They use the information provided by the data mining model to validate their knowledge and to extract correlation patterns. Then they write their own prediction rules to control product recommendations and predictions. For example, you can create a prediction rule to recommend a new mobile product called Mobile Talk that has no historical data, to customers of a specific age group.

Eligibility Rules

You can create an eligibility rule to define conditions that a customer must meet to be eligible for a product recommendation. Eligibility rules apply to both prediction rules and models. You can have rules which prevent the sale of certain products to certain customers. Management of eligibility rules can ensure the model derived recommendations don’t inadvertently violate these rules. For example, you can have an eligibility rule that ensures that you do not recommend the Mobile Talk mobile to customers in Asia because it will not work there. Achieving sales objectives through prediction rules and compliance with sales policies by eligibility rules help determine which products to select for recommendations. Eligibility rules always win over prediction models and rules.

Model and Rule Entities and Attributes: Explained

This topic explains some of the factors that can influence the selection of model and rule attributes and entities for sales prediction capabilities. Sales prediction functionality capitalizes on the power of predictive analytical models to mine and identify patterns in historical data to identify products to sell to your customers.

The decision regarding the selection of entities and attributes is critical. In some cases, the selection of certain entities and attributes may seem logical based on market expertise. For example, customers in certain industries have a stronger affinity for certain products. However in other cases, the model analysis will provide the necessary insight into sales patterns and find attribute values that correlate strongly with sales wins. Additional factors which weigh into the selection of attributes include the availability and accuracy of the attribute data. Finally, attributes that are well-populated may not turn out to be significant in prediction of a sales win.

While selecting attributes, you must not select similar attributes for model training. For example, Annual Revenue and Annual Revenue Category. Your customer’s annual revenue might range from 250,000 dollars to 50 million dollars. However, for efficient management, you decide to target only five customer types based on the Annual Revenue Category such as, Small (250,000 dollars to 1 million dollars), Medium(1-5 million dollars), and so on. The Annual Revenue Category uses Annual Revenue for this classification. Therefore, you must use either Annual Revenue or Annual Revenue Category but not both as...
they are redundant. Similar duplicate attributes could manifest in multiple areas such as Number of Employees and Company Size, Location and Postal Code, and so on.

Sales prediction capabilities also allow the inclusion of expert insight from product management, sales, and marketing operations. You can enforce these expert insights through prediction rules. The same set of entities and attributes are available for both models and rules.

Product Selection: How it Works with Prediction Models and Rules

This topic provides an overview of how product selection filtering works with prediction models and rules. You must select products within sales predictor before you run prediction model or write rules. Your company catalog contains many products but you may want to select only the top 20% high value products as eligible for prediction and recommendation management.

Product Selection for Prediction Models

When you create a model learning job, products selected from the Select Products for Recommendation task are available for further selection. You can filter products by selecting the right hierarchy level to select either a product group or a specific product. For example, if you want to select the product Vision TV, filter to the appropriate hierarchy level from where you can select specific products. Model training runs only on the products that you select.

Product Selection for Rules

If you are writing prediction or eligibility rules, you must select products manually using the list that you already selected from the Select Products for Recommendation task.

If you want to create a restriction on a product selected using the Select Products for Recommendation task, you can create a rule for that product. From the products selected, if there is a product without sufficient transaction history for models to learn on, you can create a rule for the product.

An eligibility rule further restricts the recommendation of products. If a product is not eligible for purchase by certain customers, you can exclude that product from the recommendations for those customers.

Attribute Analysis Report: Explained

This topic describes how to understand and analyze an attribute analysis report.

To schedule attribute analysis, access the Perform Attribute Analysis task under Models on the Recommendations page. Once the status of the attribute analysis report shows Succeeded, click the Job ID to view the report.

Attributes can be categorical or numeric. For example, Country is a categorical attribute and Revenue is a numeric attribute. The table below provides an example of a numeric attribute with sample values and description of each column in the report.

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entity</td>
<td>Customer</td>
<td>The entity that holds various attributes within.</td>
</tr>
<tr>
<td>Attribute</td>
<td>Annual Revenue</td>
<td>Attributes within an entity that contribute to prediction.</td>
</tr>
<tr>
<td>Null percentage</td>
<td>10%</td>
<td>Percentage of attribute values that is null.</td>
</tr>
</tbody>
</table>
### Analyzing the Report

Null Percentage and Rank are significant in identifying the best attributes, and have to be interpreted in conjunction with one another.

The table below provides an example.

<table>
<thead>
<tr>
<th>Entity</th>
<th>Attribute</th>
<th>Null Percentage</th>
<th>Importance</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>Annual Revenue</td>
<td>10%</td>
<td>0.89</td>
<td>1</td>
</tr>
<tr>
<td>Customer</td>
<td>Industry</td>
<td>30%</td>
<td>0.47</td>
<td>3</td>
</tr>
<tr>
<td>Asset</td>
<td>Asset Name</td>
<td>70%</td>
<td>0.59</td>
<td>2</td>
</tr>
</tbody>
</table>

In the example above, you notice the following:

- The null percentage of Asset Name is 70%, which means that 70% of data for this attribute is missing. Therefore, you conclude that the data is insufficiently populated and may not be suitable for prediction.
- Although Asset is ranked 2, Customer has fared better with lower null percentage. Therefore, you conclude that Asset is not contributing much to prediction and you decide to remove this attribute.
You access the Select Entities and Attributes page to delete attributes.

### Managing Prediction Rules: Examples

This topic provides scenarios where you might want to use prediction rules. Prediction rules identify target customers for target products to provide quality leads for sales.

#### Introducing a New Product

Sales executives determine that a new product will sell well to large manufacturing customers in North America who have previously bought an earlier model. The sales administrator creates a new prediction rule for the new products with the following conditions:

- Employee size > 10,000
- Industry = Manufacturing
- Region = North American
- Asset = the name of the prior model

The product expert predicts the expected revenue of 500,000 dollars if the targeted product is sold to customers who meet the rule criteria and predicts that the sales cycle should take 30 days. He sets the likelihood to buy at 95 percent.

#### Improving Product Sales

A product specialist researches why a product is not selling as well as expected. He checks the model quality reports for the product and discovers that the model is of low quality. Sales executives are sure that the product will sell well to pharmaceutical companies in the eastern United States, so the sales administrator creates a new prediction rule for the product that includes these customer conditions.

#### Dealing with Incorrect Data

The company hired several new salespeople six months ago. Since then, the company has discovered that these new salespeople used old product codes when selling several products. The model is missing accurate historical data for these products. Therefore, the company uses prediction rules based on expert knowledge to generate leads missed by the model.

### Selecting Model and Rule Entities and Attributes: Examples

This topic provides some examples of selecting model and rule entities and attributes. Based on model learning insights and your market expertise, you can select entities and attributes that are most important predictors of customers’ likelihood to buy a specific product. To achieve better predictions, you should select only well-populated attributes from the attribute analysis report. Only the selected entities and attributes are available for rules and model learning. The scenarios below provide examples

#### Scenario

**Account Type Customer**

Your company sells a service that appeals to larger customers, and another service that targets smaller customers. If a customer purchased one of your product packages, then the customer already has all service needs covered by that package. You want to know, given a product recommendation, if annual revenue, line of business, customer size, and asset owned are important predictors when it comes to recommending this particular product.
You select the following entities and attributes:

- **Account**
  - Annual Revenue
  - Line of Business
  - Customer Size Code
- **Past Purchased Products or Services**
  - Assets and Service Contracts

The selected entities and associated attributes can be used to identify buying patterns that have affected wins in the past. Over time, you can further refine the selections based on availability of data and the cost to integrate that data for evaluation.

**Scenario**

**Contact Type Customer**

Your company wants to sell a new mobile product that has no historical sales data. You want to create rules to recommend this product to young customers.

You select the following entity and attribute:

- **Contact**
  - Date of Birth

You can now select this attribute among the attributes available in the Create Prediction Rules page to create your rule that targets the new mobile product to customers born before a certain date.

**Eligibility Rules: Examples**

This topic provides examples of when you can use eligibility rules to eliminate ineligible customers from product recommendation simulations and sales leads generation, when the simulation and lead generation use prediction rules.

**Government Regulations**

You sell software and government regulations prevent you from selling certain types of software to certain countries. You write rules to prevent recommendations of these products to any customers with locations in these countries.

**Customer Criteria**

You sell two similar chemicals, both used in manufacturing, but only one meets the criteria for use in the health care industry. You write a rule to designate customers in the health care industry ineligible for one of the chemicals.

**Cross Selling**

One of your product lines is only sold to new customers because of its low profit margin. You write a rule to prevent the line from being offered to anyone as a cross sell.
Assets

You are starting a sales campaign that features your latest model microscope. You do not want to offer this model to any customer who purchased the previous model within the last year. A rule designates the new model ineligible for any customer who purchased the previous model within one year.

Selecting Best Attributes: Worked Example

You can use two methods to identify and select the most predictive attributes for model training:

- **Train, Analyze, Retrain:** This method involves training the model on a set of attributes, reviewing the results to assess their prediction accuracy, and retraining the model with an updated attribute set.
- **Run Attribute Analysis Report:** This method uses the model to identify attributes that are well-populated and compares the importance of an attribute to its peers.

This example shows how to select the best attributes to derive quality model-based predictions. In this scenario, you are a sales analyst responsible for North America sales performance. You want to analyze your model prediction and choose the best attributes for further model training. You want to focus on the product 8000RT Server.

Analyzing Prediction Model

1. In the Tasks region, click **Analyze Model Results** under Models.
2. In the Analyze Models Results page, find the **8000RT Server** product.
3. Click the product to view the model reports.
4. Analyze the attributes for likelihood to buy.

   Based on your analysis, you find that there is a strong association between customers in high technology industry and the sale of 8000RT Server. Additionally, customers who own the 6000RT server tend to buy the 8000RT server as its replacement. This is determined based on the likelihood to buy and rule support values of 8000RT server. You can use this association to create rules to target future sale of 8000RT server to customers in the high technology industry who already own 6000RT servers. Therefore, you decide to select the **Industry** attribute on the Select Entities and Attributes page.

Performing Attribute Analysis

Attribute Analysis Report helps you identify the best attributes for predicting win rates for an opportunity and a customer’s likelihood to buy a product, relative to those attributes that do not meaningfully contribute to model quality.

1. In the Tasks region, click **Perform Attribute Analysis** under Models.
2. Click **Actions** and **Create**.
3. Complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attribute Analysis Report Name</td>
<td>8000RT Servers 2011</td>
</tr>
<tr>
<td>Start Date</td>
<td>1/1/2011</td>
</tr>
<tr>
<td>End Date</td>
<td>12/31/2011</td>
</tr>
</tbody>
</table>
1. Click Continue.
2. In the Attribute Analysis Report Process page, click Submit.
3. In the confirmation dialog box, click OK.
4. Once the report is generated, click the 8000RT Servers 2011 report.
5. Review the report:
   - Attribute rank: The report ranks attributes based on their importance. Review the rank of each attribute.
   - Null percentage: Higher null percentage indicates poorly populated data. For example, if an attribute is ranked 1 but the null percentage is 90%, you would not select this attribute for model training as the ranking is only based on poorly populated data.
   - Median and Average: Review the median and average to further analyze the distribution of data.

You will notice the following:
6. Small Business Indicator is one attribute that is ranked high in the report and the null percentage is very low.
7. Annual Revenue is also ranked high, but the null percentage is also very high.
8. You decide to select Small Business Indicator and remove Annual Revenue before running model training again.

Selecting Attributes
You must select or deselect attributes from the Select Entities and Attributes task.

1. In the Tasks region, click Select Entities and Attributes under Tools.
2. In the Select Entities and Attributes page, click Account under the Model region.
3. In the Available Attributes region, search for Small Business Indicators and move it to Selected Attributes.
4. Click OK.

Note: For each Entity, add attributes that attribute analysis report recommends to be most important for predicting win rates.

5. Click Save and Close.

Now that Small Business Indicators is selected, model training should improve the association between attributes.

Similarly, select the Industry attribute under the Rules region.

Retraining the Model
You must run model training again with the updated set of attributes.

1. Run model training.
2. Click Analyze Model Results to review the updated association model report.

You are satisfied with the results and you are ready to generate leads and recommendations.
Generating Leads Using Models and Rules: Worked Example

This topic shows an example of using predictive model and prediction rules to generate sales leads.

You are a sales analyst responsible for reviewing, analyzing and measuring North America sales performance. The sales plan for the new quarter emphasizes selling several servers, and you want to provide high quality leads at the earliest. You have trained the predictive models with the past years’ sales opportunity revenue data and used the model to generate sales leads for the past two quarters. The specific servers your company wants to sell this quarter are:

- 8000RT Servers
- 900VR Servers
- 550VR Servers
- DG 150 Green Servers, a newer product

To generate leads for these products, you first analyze model results, create prediction rules where model results do not support your business needs, simulate product recommendation, and then finally generate leads.

Analyzing Model Results

1. In the Models region, click the Analyze Model Results task.
2. In the Analyze Model Results page, view the association model report to analyze the predictions.
   Association model reports show that customers in the high technology industry located in the US tend to buy new products like the DG 150 Green Servers based on past history.

Creating a Prediction Rule

Based on the insight from the model report and your business knowledge, you create a rule for this product.

1. In the Tasks region, click Manage Rules.
2. In the Manage Rules page, select Rules in the Show field.
3. Click the Create Rule icon and then click Prediction Rule.
4. In the Create Prediction Rule page, enter the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Name</td>
<td>Target High Tech Customers in the US</td>
</tr>
<tr>
<td>Description</td>
<td>US High Technology customers are great sales targets for DG 150 Green Servers. Likelihood-to-buy &gt; 70%</td>
</tr>
<tr>
<td>Start Date</td>
<td>01/06/2012</td>
</tr>
<tr>
<td>End Date</td>
<td>01/06/2013</td>
</tr>
</tbody>
</table>

5. In the Rule Folder field, click New. In the Create Rule Folder page, enter the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folder Name</td>
<td>DG 150 Green Servers</td>
</tr>
</tbody>
</table>
Setting Up Predictions

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong></td>
<td>Prediction rules for DG 150 green servers</td>
</tr>
<tr>
<td><strong>Folder Status</strong></td>
<td>Test</td>
</tr>
</tbody>
</table>

**Note:** Change the status to **Production** after you run simulation and you are satisfied with the results.

When you set the folder status to **Production**, recommendations based on the rules in this folder are immediately visible in consuming applications.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Start Date</strong></td>
<td>01/06/2012</td>
</tr>
<tr>
<td><strong>End Date</strong></td>
<td>01/06/2013</td>
</tr>
</tbody>
</table>

6. Click **OK**.
7. In the **Record Type** list, select **Account**.
8. In the Target Products region, click the **Select and Add** icon.
9. In the Select Target Products page, search for and add **DG 150 Green Server**.
10. Complete the fields, as shown in this table.

The application computes likelihood, revenue, and sales cycle estimates based on the model analysis. These values can be used as recommended, as guidance for defining and refining your own values, or overridden entirely in favor of realizing sales objectives.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name</strong></td>
<td>DG 150 Green Servers</td>
</tr>
<tr>
<td><strong>Estimated Likelihood to Buy</strong></td>
<td>75</td>
</tr>
<tr>
<td><strong>Estimated Revenue</strong></td>
<td>150000</td>
</tr>
<tr>
<td><strong>Estimated Sales Cycle</strong></td>
<td>40</td>
</tr>
</tbody>
</table>

11. In the Conditions region, select **Recommend the target products to a customer if all the conditions hold** from the **Connective** list.
12. Click the **Add Row** icon.
13. Use selections to enter the following condition: Customer / Country = US.

Only those attributes that are selected in the Select Model and Rule Entities and Attributes page are available here for selection.
14. Click the **Add Row** icon.
15. Use selections to enter the following condition: Customer / Industry = High Technology.
16. Click **Save and Close**.
Simulating Recommendations

Based on the analysis of the model results and the prediction and eligibility rules for the servers, you can conduct a simulation to ensure that the correct customers are targeted for the servers under evaluation.

1. In the Tasks region, click **Simulate Recommendations**.
2. Complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Type</td>
<td>Account</td>
</tr>
<tr>
<td>Based on</td>
<td>Rules</td>
</tr>
<tr>
<td>Rule Folders</td>
<td>Production: Select All.</td>
</tr>
<tr>
<td></td>
<td>Test: Select the appropriate test folders.</td>
</tr>
<tr>
<td>Number of Recommendations</td>
<td>10</td>
</tr>
<tr>
<td>Ranked by</td>
<td>Likelihood to Buy</td>
</tr>
<tr>
<td>Recommended only if likelihood to buy is at least</td>
<td>70%</td>
</tr>
<tr>
<td>Customer Account 1</td>
<td>Pinnacle Technologies</td>
</tr>
<tr>
<td>Customer Account 2</td>
<td>Maple Networks</td>
</tr>
<tr>
<td>Customer Account 3</td>
<td>Serenity Systems</td>
</tr>
</tbody>
</table>

3. Click **Simulate**.
4. Mouse over each of your target products for each customer to review the likelihood to buy, estimated revenue, and estimated sales cycle.

The simulation results look to be accurate for the three customer accounts based on your evaluation of the model results for the servers under evaluation. The simulation verifies the model analysis and the rules, instilling confidence in generating and distributing leads. You are confident that generating leads will fulfill your sales objectives for three of the servers.

### Scheduling Sales Leads Generation

1. In the Tasks region, click **Generate Leads**.
2. Click the **Create** icon.
3. Complete the fields, as shown in this table.
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Create Sales Leads for West Region</td>
</tr>
<tr>
<td>Record Type</td>
<td>Account</td>
</tr>
<tr>
<td>Generated By</td>
<td>Prediction Rules</td>
</tr>
<tr>
<td>Production Rule Folders</td>
<td>All</td>
</tr>
<tr>
<td>Maximum Number of Recommendations per Customer</td>
<td>5</td>
</tr>
<tr>
<td>Ranked By</td>
<td>Likelihood to buy</td>
</tr>
<tr>
<td>Select Option</td>
<td>By Sales Territory</td>
</tr>
<tr>
<td>Territory Name</td>
<td>Sales Overlay West</td>
</tr>
</tbody>
</table>

4. Click **Continue**.
5. Click **Advanced** and **Select to run as soon as possible**.
6. Click **Submit** and then click **OK**.

On the Generate Leads page, you will see the report icon in the View Report column after the leads preview process has completed successfully.

7. Click the report icon for your lead.
8. Preview and select leads that you want to generate from the Preview Leads page.

You can select multiple leads and save. Once you are ready with all your selections, you can generate leads.

9. Click **OK**.
10. Schedule a second lead generation by model analysis to generate leads for the three servers. Complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Generated by</td>
<td>Model</td>
</tr>
<tr>
<td>Select Option</td>
<td>By Profile</td>
</tr>
<tr>
<td>Industry</td>
<td>High Technology</td>
</tr>
</tbody>
</table>

Analyze Leads Generated: Examples

This topic provides examples to illustrate how sales analysts analyze previously generated leads. A sales analyst can validate if leads are being generated as expected by simulating product recommendations before generating leads for select...
customer accounts. Use the Analyze Leads Generated task if you have a large number of customer accounts and products to analyze.

**Customer Accounts**

Your company has introduced a new television product called Vision. Since the product does not have any historical data, you create rules that can specify which customer accounts are eligible for recommendation based on their attributes. You generate leads and later you want to check the leads that were generated for Vision TV. Although you expected that this product will be recommended to 10 customer accounts, the Analyze Leads Generated report shows that the product was recommended to only eight customer accounts. You review the rules and find that there is an eligibility rule that specifies that the Vision TV cannot be recommended to customer accounts from UK. You now know that the leads generated were accurate and that no further changes are required.

**Products**

You analyze leads generated to check the number of products that were recommended to the customer account Maple Global. Only 13 products from your sales catalog were recommended to this customer account while you were expecting that 15 products would be recommended. You analyze this further and find that two products were new and there was no sufficient data for model learning to learn on. You then write rules specifying attributes for these two products and generate leads again. When you analyze leads generated, you see that all 15 products were recommended for Maple Global, as expected.

Using Reports to Analyze the Model: Example

You can use reports to analyze predictions and correlations found by predictive models. The following scenario illustrates how to use the association model report.

**Association Model**

Your company wants to improve sales of the 9800 Green Server product. Since this product has been around for some time, you are mining historical data to review trends. Search for the 9800 Green Server on the Analyze Model Results page to review the association model report. The association model report shows three factors that influence buying patterns for the 9800 Green Server:

- 750VR Server product
- High technology customers
- High revenue customers

Higher likelihood to buy and higher rule support are highly correlated with a customer buying the recommended product. The report shows that high revenue high technology customers are more likely to buy this server. It also indicates that most customers who own the 750VR Server also buy the 9800 Green Server. Based on these associations, create rules to generate leads for the 9800 Green Server.

What's the difference between eligibility rules and prediction rules?

Criteria in an eligibility rule define when a customer is eligible or ineligible for a specific product or product group. Analytical calculations process eligibility rules first before prediction rules to remove ineligible customers from further calculations. For example, customers who purchased Model 1000 Microscope within the last year are ineligible to purchase the new Model 2000.
Prediction rules are an alternative to using the statistical model to generate predictions and leads. You create prediction rules, based on your industry or product expertise, to identify products to sell to customers who meet predefined conditions. Use prediction rules when new products are introduced, to promote products with a poor sales history, or to push products to align with marketing initiatives. For example, recommend a new Model 2000 to customers who purchased Model 1000 Microscope three or more years ago.

What happens if a prediction rule conflicts with another prediction rule?

If two or more prediction rules overlap or conflict, then the prediction rule with the most recent update date takes precedence.

In this example, two rules overlap:

- Rule 1
  - Customers in the United States
  - Target product: Model 2000 Microscope
- Rule 2
  - Customers in the East United States
  - Target product: Model 2000 Microscope

If Rule 2 is edited last, then Model 2000 Microscope predicted metrics for East US customers override those from Rule 1 when the lead generation process is executed. The predicted metrics defined for Rule 1 apply to leads generated for customers within the US but not in the East US.

In this example, two rules conflict:

- Rule 1: Customers not in US target Model 2000 Microscope (essentially position this product to all customers everywhere but in the US)
- Rule 2: Customers in US target Model 2000 Microscope

The conflict between rules in this case, results in leads generated for Model 2000 Microscope to all customers (US or otherwise), which is not the intent. Each rule works to undermine the objective of the other.

What happens if an eligibility rule conflicts with a prediction rule?

Eligibility rules are always evaluated first before prediction rules. For example, if an eligibility rule states that a customer is ineligible for a certain product, then the customer is ineligible regardless of whether or not that customer is targeted for that particular product in the prediction rule.

Can I modify rule attributes from one folder to another?

Yes. From the Create Prediction Rule page or Create Eligibility Rule page you can change rule attributes only if the attributes satisfy the conditions of the parent folder. For example, you can change the folder name, start and end dates, and the Active status of the rule.
What's current model quality?

A number from 0 to 100 indicates the predictive power of a model. The higher the model quality value, the more impact the resulting predictions have against a random sampling of events. Therefore, the products with higher model quality can be targeted to prospective customers, improving sales success.

Can I run multiple sales leads generation processes simultaneously?

No. Only one leads generation process, or the model training process, can run at a time. The process you submit goes into the queue and runs after the process currently running completes.

Model Training

What's model training?

Model training (or learning) is the process of discovering intrinsic structures in the data using a set of algorithms. The algorithms extract patterns and relationships to make future predictions. The predictive models learn from historical opportunity revenue data and predict:

- What products a customer is likely to buy next
- The estimated revenue
- The projected sales cycle

When does the model need to be trained?

The model requires initial training to gather and analyze historical data. If your sales history is fairly stable and consistent, your initial results will still apply. If there are abrupt changes (such as market conditions, supplies, demand, or seasonality), you can conduct an entirely new model training.

Model Training: Example

This topic provides an example of model training. Model training discovers intrinsic structures in historical data and makes predictions for future leads and recommendations.

Scheduling Model Training

You are a sales analyst responsible for North America Sales in a server manufacturing company. You want to use the predictive model to mine historical data and use them to generate quality leads. You select 20 server products that you want to promote and run model training.
To schedule model training:

1. Click the Train Model task under the Models heading.
2. In the Train Model page, click the Create icon in the Scheduled and Completed region.
3. In the Create Predictive Model Training Process page, select the sales period that you want the model training to use for the prediction.
4. Click the Continue button.
5. Click the Submit button and then click OK.

You scheduled model training. You can see the status of your model training process on the Train Model page. You analyze the predictive model to check if the model findings are accurate and can be used to generate leads. When you analyze the reports, you realize that few old server products can only be recommended to customers who are already using a related product. You want to create an eligibility rule to ensure that the prediction model does not recommend these servers to customers who do not own the related product. You access the Manage Sales Prediction Rules task to create the eligibility rule.

After writing the eligibility rule, you run model training again.

\[\text{Note:}\] You can simulate product recommendations before generating leads.

You are now satisfied with the model predictions and you are ready to generate leads. After the initial model training, you can run model training incrementally.

## Recommendations

### Sales Prediction Configuration Parameters: Explained

Sales prediction functionality provides configuration parameters that you can edit to influence how the application works. These configuration parameters control how recommendations are generated and displayed in other applications.

#### Configuration Parameters

The sales prediction parameters are listed in the following table.

<table>
<thead>
<tr>
<th>Configuration Parameter</th>
<th>Default Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AssocModelNumofTopCorrelationDrivers</td>
<td>5</td>
<td>Defines the number of association model correlation drivers displayed in the table and on graphs in recommendation rationale.</td>
</tr>
<tr>
<td>AssocModelRecommendationConfidence</td>
<td>0.5</td>
<td>Defines the minimum confidence threshold for recommendations when using association model.</td>
</tr>
<tr>
<td>AssocModelRecommendationRuleSupport</td>
<td>0.0001</td>
<td>Defines the minimum rule support threshold for recommendations when using association model.</td>
</tr>
<tr>
<td>AssocModelTrainingRuleSupport</td>
<td>0.0001</td>
<td>Defines the minimum threshold for association model rule support during model training.</td>
</tr>
</tbody>
</table>
## Recommendation Metrics: Explained

Sales prediction features provide recommendation metrics on top products that customers are likely to buy, along with sales cycle and revenue estimates.

Models and rules generate recommendations based on the following metrics:

- Likelihood to buy
- Recommendation rating
- Estimated revenue
- Estimated sales cycle

### Likelihood to Buy, Rule Support, and Lift

Sales prediction functionality uses the Oracle Data Mining (ODM) association model to generate reports that show the likelihood to buy metrics.

The reports show the following metrics:

- **Rule Support**: Indicates the ratio of occurrence of the influencing customer attribute and recommended product together over the total number of records. Support value ranges between 0 and 1.
- **Likelihood to Buy**: Indicates the ratio that shows the occurrences of the influencing customer attribute over records containing the recommended product. Likelihood to Buy value ranges between 0 and 1.
- **Lift**: Indicates the improvement in predictive ability when using association model prediction over randomness. The baseline for lift is 1. If the lift is greater than 1, it indicates that the predictive ability while using prediction is better than randomness.

### Recommendation Rating

Sales prediction functionality provides a star-rating system to help you analyze recommendations. The star-rating system uses a scale of 1 to 5 stars to indicate the strength of the recommendation. The recommendation rating is calculated using the likelihood to buy and average win rate metrics.
Estimated Revenue and Sales Cycle
Sales prediction features use native Oracle data mining capabilities to estimate revenue and sales cycle. Sales cycle is the interval between the time when the revenue line is created and the time when it’s closed. After a lead is generated, sales predictor estimates the revenue for the potential sale of a product to a customer.

Metrics - Model and Rules
When you run model training and analyze predictions, you will first see the metrics for likelihood to buy. You can select the estimated revenue, sales cycle, or the association model to view these metrics. When creating a prediction rule, a set of business intelligence generated metrics are populated automatically for each target product selected (if past sales data exist for the product). The business intelligence metrics are calculated based on predefined formulas which are different from the model predictions. Product experts can use the prepopulated metric values or override the values based on their expertise.

Metrics Usage within Oracle Sales Cloud
The recommendation metrics generate leads that are assigned to salespersons within opportunities. Sales prediction features also feed recommendations to manage customers, where salespersons can view product recommendations for specific customers and pursue these leads.

When do I simulate product recommendations?
Simulate product recommendation before generating leads, to preview what products are being recommended to specified customers from either model or rule predictions. Use simulation results to check if prediction rules are evaluated correctly.

When do I enter product recommendation estimates for a sales prediction rule?
For each product that you recommend in the prediction rule, the application provides calculated estimates for each of the three predictions: likelihood to buy, sales revenue, and sales cycle in days. These serve as a guideline for current sales performance of the product. You can override these predictions using your expert knowledge of the market.

If the product or product group is new or has insufficient past sales data, then no estimates are provided. You must enter estimates based on your market expertise.

Why are model-based recommendations or leads not visible in consuming applications?
Model-based recommendations or leads might not be visible in consuming applications because the configuration parameter displayModelBasedRecommendations might be set to False. The administrator should set this parameter to True for all model-based recommendations and leads to appear in consuming applications.
Chapter 24
Setting Up Quotas

Sales Quota Management: Overview

Sales Quota Management provides a comprehensive solution for managing sales quotas to maximize quota attainment and improve overall sales performance. Effective top-down planning with bottom-up assessments ensures that quotas relate to corporate goals. After the sales plan is deployed for the year, sales executives can then monitor and track sales performance by comparing forecasts with actuals and with quotas.

Summary of Features

The key features of Quota Management include the following:

- Assign territory quotas to territories and resource quotas to people.
- Create custom sales goals such as number of sales calls.
- Review quotas assigned to you by your senior manager and allocate quotas to your salespeople.
- Compare quota to revenue, pipeline, forecast, and other metrics using business intelligence.
- Use formulas to calculate territory quotas using measurements of historical data and future potential.
- Add adjustments to your quota to cushion against attainment risk.
- Track current quota achievement compared with quota targets.
- Manage seasonal variations in sales by distributing the revenue quota among several calendar periods using seasonality guidance.
- Send notification to Incentive Compensation with new and changed individual quota assignments for all sales goals.
- Use a round trip export, update, import of quotas to add bulk quotas from spreadsheets.

Quota Components

Sales Quota Plan Components: How They Work Together

Quotas are a reflection of sales targets set for an individual in a sales organization. After a corporate goal is established, managers distribute quotas down through the sales territory hierarchy until all territories and their respective owners have quotas. Sales managers can compare quota projections based on historical sales information and metrics with quotas being set. You can use one sales quota plan for the fiscal year.

In this figure, a sales quota plan contains several territories, each assigned a quota. Territory quota formulas compute projected quotas based on historical sales information and metrics such as forecasts and market potential. The projected
quotas appear as default territory quota amounts. Distributing quota to your team using spread formulas allocates quota based on the contribution of each of the territories.

Sales Quota Plan

The administrator can create one or more sales quota plans. Each sales quota plan covers a period of one year. Active territories become part of the new quota plan, and the administrator can add territory proposals to allow the setting of quotas for proposed territories. Sales quota plans are inactive until the administrator activates them.

Territories and the resources assigned to them change frequently. The administrator can synchronize the latest active and proposed territories with a selected quota plan by clicking Synchronize in the Manage Sales Quota Plans page. The administrator should also schedule the Synchronize Quotas process to run daily so that current and future quota plans that are active will use the latest territory hierarchy.

Note: The administrator can designate only one plan to be used for tracking quotas for the year.

Setting the available options for the quota plan is not required. For the sales quota plan options, the administrator selects an adjustment threshold, a territory quota formula, and a seasonality factor group to apply to all or to individual territories.
Territory options override sales quota plan options. For example, the territory quota formulas and seasonality factor groups selected for individual territories override those set at the quota plan level.

The administrator can also set a threshold percentage for adjustment amounts that managers often add to quotas.

In this figure, the assigned quota gets split over each month through seasonality factors that raise or lower quota amounts according to seasonal fluctuations.

**Territory Proposals**

You can associate territory proposals to your sales quota plan. When sales administrators or sales managers create new proposed territories, such as for a territory realignment, they can enable the setting of quotas for the proposed territories by selecting Eligible for Quota. If you then associate the proposals to your quota plan, you see the proposed territories within the current active territory hierarchy, and salespeople will be able to assign quotas to the proposed territories.

**Sales Goals: Explained**

A sales goal determines how quota is measured and defines what you want to measure. You set sales goal quotas for a resource, not for a territory. Commonly used sales quotas are simply salesperson targets for revenue achievement in their respective territories. Such sales quotas are modeled as Sales Revenue Goals. Allocating a quota for a sales revenue goal is required, and optionally quotas can be allocated for additional sales goals. Create additional sales goals, such as number of units sold, if you want to assign other quotas to your salespeople.

This figure shows the components of a sales goal. A sales goal supports a particular objective. You can use any unit of measure for your sales goal and specify what to measure, for example, number of units sold. The provided unit of measure
choices are amount and quantity, but you can also define your own unit of measure. Each sales goal contains only one measure. You can also focus the sales goal on one or more product groups.

The unit of measure can’t be changed after the administrator creates the sales goal. The provided Sales Revenue Goal has a unique value for Goal Number of GOAL_1000. While quotas can be allocated to sales goals which have one or more associated product groups, there are no roll up reports available to compare these quotas against actual sales.

**Note:** Do not make changes to the sales goal object using Application Composer.

**Multiple Quotas for One Resource**

You can create multiple sales goals and assign multiple quotas to one or more sales goals for a resource.
This figure shows multiple quotas assigned to a salesperson within the current active quota plan year. The salesperson owns a territory and therefore has a Revenue Goal quota plus the two quotas manually assigned by the salesperson’s manager.

A resource can have only one quota per sales goal for the year. You can assign new quotas only for active sales goals. Inactivating a sales goal doesn’t affect existing quotas for that sales goal. When you submit notifications to compensation, quotas for all sales goals for the resource are included in the notification.

**Territory Quota Formulas: Explained**

Territory quota formulas calculate territory quota based on historical sales information and metrics such as forecasts and market potential. The calculated quotas appear as default territory quota amounts in the sales quota plan.

The formulas execute a Multidimensional Expressions (MDX) query on the territories Oracle Essbase cube.

Administrators can change parameters for formulas and set each formula to active or inactive.

**Predefined Formulas**

Following are explanations for a few of the predefined territory quota formulas.

- Scale a measure from a past period by a percentage
  
  Total the amounts for a selected measure for the past selected year. Calculate the stated percentage of the total and add it to the total.

  For example, 110 percent of closed bookings for fiscal year 2014.
- Percentage change in a measure value over 2 consecutive periods
  Subtract the total amounts for a selected measure for one year from the total amounts for the subsequent year. Divide the difference by the total of the first year to determine the percentage of change. Calculate the percentage of the total value of the second year and add the result to the year’s total.
  For example, closed bookings for 2014 minus closed bookings for 2013 divided by 2013 total gives the rate of change as 8 percent. Calculated quotas are 108 percent of the 2014 closed bookings.

- Percentage change in a measure value over 2 named time periods (current and past)
  Subtract the total amounts for a selected measure for a selected year from the total amounts for the current year. Divide the difference by the total of the earlier year to determine the percentage of change. Calculate the percentage of the total value of the current year and add the result to the year’s total.
  For example, closed bookings for 2015 minus closed bookings for 2011 divided by 2011 total gives the rate of change as 7 percent. Calculated quotas are 107 percent of the 2011 closed bookings.

Creating Formulas
Use the Essbase MDX Script Editor to create your own territory quota formulas. When you define a custom formula that includes a metric, use a parameter for the metric name, rather than defining the metric name as part of the formula expression.

For more information about MDX functions, see Oracle Essbase Technical Reference.

For more information about MDX queries, see Oracle Essbase Database Administrator’s Guide.

What's a spread formula?
A spread formula calculates the distribution of an amount among selected child territories. For example, a spread formula takes the variance between the parent territory quota and the sum of the quotas for the child territories, and spreads it to the child territories.

The formula calculates the ratios to use for the child territories through the use of the metric defined for the selected spread formula. The formula examines each territory contribution of the metric value for a period, and compares it with the total value of the same metric for all the territories combined, to determine the percentage to apply to each territory. When a spread formula has no metric selected, then it distributes the amount evenly across the child territories.

Quota Administration

Managing Sales Quota Plans: Worked Example
This example shows how to create a new sales quota plan for the coming year.

You are the sales administrator and it is a month before the start of the fiscal year. You start the sales quota planning process by creating a sales quota plan for the year.

1. Review the provided territory quota formulas.
2. Create a new spread formula that sales managers can use to spread a quota amount among child territories.
3. Create a seasonality factor group that describes how to split quota over quarters and months. For example, you can split your annual quota to be achieved 10% in Q1, 20% in Q2, 30% in Q3 and 40% in Q4.

4. Create a sales quota plan. Select a fiscal year for which you want to allocate quota. Creating a quota plan automatically takes a snapshot of active territories. Assign seasonality factor groups to the plan. Associate the seeded territory quota formulas to the quota plan.

**Tip:** If quotas have largely remained unchanged from the previous year, then use the Copy Quota Plan option to move quotas from the previous year to the current year.

5. In the North America Sales territory, select a territory quota formula and other options such as the adjustment threshold.

**Prerequisites**

1. Define a calendar to be used by Oracle Sales Cloud. Quotas can be set for the year as well as for periods defined in the calendar. After the calendar is set up you can add years to it, but any other changes to the calendar can break quota features. A report calculated by time period is one example.

2. Create and activate a territory hierarchy. Consider setting up territories with no coverage if you have no use case for territories but would still like to save quotas in the system for sales reporting. Each salesperson eligible to receive a quota must be assigned to an active territory.

3. Territory metrics are enabled and have values. This is a prerequisite to using territory quota formulas to calculate quota.

**Creating a Spread Formula**

This spread formula calculates the ratio of closed bookings among the child territories, and applies the ratios to the quota amount a sales manager wants to spread among the child territories.

1. Go to the **Manage Spread Formulas** page.

2. Click **Create** to add a new spread formula.

3. In the new row, enter information for the fields, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Closed Revenue</td>
</tr>
<tr>
<td>Description</td>
<td>Spreads the source based on the ratio of closed revenue for the selected year.</td>
</tr>
<tr>
<td>Metric</td>
<td>Closed Revenue</td>
</tr>
</tbody>
</table>

4. Click **Save**.

**Creating a Seasonality Factor Group**

1. Go to the **Manage Seasonality Factor Groups** page and create a new group for summer products for the new year.

2. In the **Seasonality Factors** region, enter the factor percentages for time periods, as shown in this table:

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Factor Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quarter 1</td>
<td>15</td>
</tr>
<tr>
<td>Quarter 2</td>
<td>40</td>
</tr>
</tbody>
</table>
### Creating a Quota Plan

1. In the Manage Sales Quota Plans page, click **Create**.
2. In the Sales Quota Plans table, enter the sales quota plan information, as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Fiscal Year 2015 Sales Plan</td>
</tr>
<tr>
<td>Description</td>
<td>Corporate Sales Quota Plan for Fiscal Year 2015</td>
</tr>
<tr>
<td>Year</td>
<td>2015</td>
</tr>
<tr>
<td>Calculate Default Territory Quota</td>
<td>Select. If selected, the application calculates the quotas for each of the territories using the default territory quota formula.</td>
</tr>
<tr>
<td>Track</td>
<td>Deselect. Only one plan can track quotas for the year.</td>
</tr>
</tbody>
</table>

3. In the Details region, on the Options tab, enter the options as shown in this table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjustment Threshold</td>
<td>10</td>
</tr>
<tr>
<td>Territory Quota Formulas</td>
<td>Scale a measure from a past period by x percent. Use 5% and select the prior year, 2014.</td>
</tr>
<tr>
<td>Seasonality Factor Group</td>
<td>Summer</td>
</tr>
</tbody>
</table>

4. In the Sales Quota Territory Options table on the Options tab, expand the Global territory and enter the options as shown in the table for the North America Sales territory.
<table>
<thead>
<tr>
<th>Column</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow Quota Edit</td>
<td>Select</td>
</tr>
<tr>
<td>Adjustment Threshold (%)</td>
<td>8</td>
</tr>
<tr>
<td>Territory Quota Formulas</td>
<td>$x$ percent growth of a measure over a 3 year simple moving average</td>
</tr>
<tr>
<td></td>
<td>a. 3 percent</td>
</tr>
<tr>
<td></td>
<td>b. Prior year 2014</td>
</tr>
<tr>
<td></td>
<td>c. Closed Detail Revenue by Close Date measure</td>
</tr>
</tbody>
</table>

5. Select **Track** for the quota plan.
6. Click the **Activate** button and set the activation to right now to test. Upon activation, sales managers can go into the system to begin allocating quotas to their teams.
7. Click **Save**.

**Related Topics**

- Territory Coverage: Explained

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**Enabling Quota Copy: Explained**

When you copy territory quota to resource quota, period quotas for the territory also get copied to resource period quotas, if enabled. You can also enable copying both territory and period quotas to resource quotas automatically during publishing. You can set the following profile options using Manage Administrator Profile Options in Setup and Maintenance.

**Enable Territory Quota Period Copy**

When set to yes, users can copy territory quota period amounts to owner resource quota periods. The copy overwrites any existing resource period quotas. The annual resource quota amount must be zero, or the period quotas won’t be copied to resource quota periods. Period copy applies to the following actions:

- Copy Territory Quota in the Edit Sales Quotas page
- Copy Territory Quota in the Manage Sales Quotas page
- Copy Child Territory Quota in the Manage Sales Quotas page
- Publish territory quota, if the Enable Automatic Territory Quota Copy to Owner Quota on Publish profile option is also enabled

**Enable Automatic Territory Quota Copy to Owner Quota on Publish**

When set to yes, territory quota annual values are copied to owner quotas for the sales revenue goal when users publish territory quotas. You can also set the Enable Territory Quota Period Copy to yes. Then the territory quota period amounts are also automatically copied to owner resource quota periods during the publish process.
Scheduling Quota Processes

Your active quota plan needs to reflect the latest territory hierarchy. Sales managers or administrators frequently make changes to active territories directly, using territory proposals, or through web services. Only if you update territories using a territory proposal are the territory hierarchies synchronized automatically. Schedule synchronization to run frequently to provide the latest structure for allocating quotas.

Perform the following steps to schedule the Synchronize Quotas process to run daily.

1. If you are using the implementation project provided with the Getting Started with Your Oracle Sales Cloud Implementation guide, then open the Synchronize Quotas task from the project.
2. If you are not using the implementation project, then do the following:
   a. Sign in as a setup or sales administrator user.
   b. Open the navigator.
   c. In the Tools menu section, click Scheduled Processes.
   d. Click Schedule New Process.
      The Schedule New Process dialog appears.
   e. For the Type field, select Job.
   f. In the name field list, click Search.
   g. Search for Synchronize Quotas.
   h. Select Synchronize Quotas and click OK.

   The Process Details page appears.
3. In the Parameters region, select the sales quota plan.
4. Click Advanced.
5. In the Schedule tab, select Using a schedule.
6. Select the Daily frequency.
7. Change the start date to when you want to start running the process, and select the time of day when you want it to run.
8. Change the end date to a future date.
9. Click Customize Times if you want to remove or add specific dates to those the application calculates.
10. Use the Notification tab to add notifications to specific people when the process completes.
11. Click Submit.

Quota Validation: Explained

Administrators can turn off the quota validation that occurs when sales managers publish quotas. The validation prevents assigning quotas prior to resource start dates (the same as employee hire dates) or territory quota start dates.

If an employee joins the company or a new territory is created midyear, then managers can’t assign quotas for all of the year periods with validation turned on. To turn off validation, set the following profile option to no: Allow quota start date validation during publish.
Adding Custom Reports to Sales Quota Pages: Procedure

You can create custom reports using Answers or Business Intelligence and add them to quota pages. Your reports appear in the Managing Sales Quotas page or Edit Sales Quotas page. You can select the report from the list of reports on the page.

To add a report to your page:

1. Create your custom Answers or Business Intelligence Publisher reports for quotas.
2. In Setup and Maintenance, go to Manage Lookups.
3. Go to the lookup type ORA_MOT_MSQ_REPORT for the Manage Sales Quotas page, or ORA_MOT_ESQ_REPORT for the Edit Sales Quotas page.
4. Add a new lookup code for each new report to be added on the page. For example, to add a second report to the Manage Sales Quota page, add the lookup code MOTQM_MSQ_REPORT2. To add a custom report to the Edit Sales Quota page the lookup code would be MOTQM_ESQ REPORT3. For each additional custom report to embed in the page, increment the number used in the lookup code.
5. In the Meaning field, enter the report name, for example Quotas by Salesperson Report. The name does not need to match with the report name in the Business Intelligence catalog.
6. In the Description field, enter the report absolute path, for example /shared/Sales/Analytic Library/Embedded Content/Sales Quota Management/MyCustomBIPReport.xdo. To find the absolute path:
   - For Answers reports, find the absolute path in the properties of the report.
   - For BI Publisher reports, click the Copy Resource button to find the absolute path to the report.
7. Set the display sequence. This determines the order of the reports shown in the Analytics tab. The report lookup code with the lowest display sequence number determines the report that is displayed by default.

What happens when a sales quota plan is activated?

When you activate a sales quota plan the status of the plan is changed to completed when the plan year ends. You cannot make changes to a completed quota plan.

When you activate a quota plan a process carries out the activation. Another process runs when the quota plan year end date is reached, or if it has passed at the time of activation. The second process changes the status of the sales quota plan to Completed. You cannot edit a completed sales quota plan.

What happens if I select Calculate Default Territory Quota?

Your selection of Calculate Default Territory Quota causes the application to compute the quotas for each of the territories when the sales quota plan is activated. The computations use the formula and parameters you selected to be the default in Manage Territory Quota Formulas.

What's seasonality?

Annual quotas are distributed to shorter time periods, factoring in seasonal expectations in sales. This expectation is represented as a percentage factor, which reflects the share of quota for the season, or time period.
For example, your sales are typically higher the last quarter of the year and at their lowest the first quarter of the year for several of your product lines. You create the following seasonality factor group, named Retail, to automatically distribute your annual quota and factor in the seasons:

- 10 percent for the first quarter
- 25 percent for the second quarter
- 25 percent for the third quarter
- 40 percent for the fourth quarter

When you assign quota to territories that include these product lines, you apply the Retail seasonality group to correctly distribute the annual quota amounts.

What's the difference between territory and resource quota start and end dates?

Territory quota start date and end date define a period within which the sales quota target needs to be achieved. The territory quota dates must fall within the start and end dates of the quota plan, and usually match the sales quota plan start and end dates, unless a territory is created after the start of a sales quota plan or deleted during the course of a sales quota plan.

The resource quota start and end dates define a period within which the quota needs to be achieved by the salesperson, and usually match the sales quota plan start and end dates.

Resource dates vary from the sales quota plan start and end dates when:

- A territory is deleted. All resource quotas within the territory have the same end date as the territory end date. The sales quota plan end date is not yet reached.
- A territory resource is removed from a territory, and the resource is end dated.
- Quota is assigned to a future dated resource who will join the organization in future.

Who is a territory administrator?

Sales managers often choose a salesperson or sales operations resource to assist with the quota setting and territory maintenance for the manager’s branch of the territory hierarchy. Select the Administrator check box for a territory team member in your territory. Now that person can view your territory and modify all territories lower in your territory hierarchy. She can also assign sales quotas for you.

You must add the Territory Management Administration Duty to a security job role assigned to the resource in order for the Administrator selection to take effect.

A user with the Sales Administrator security role can modify all territories and set all quotas.

How can I add period quotas prior to the resource start date or territory quota start date?

Your administrator can turn off the date validation that occurs when you publish quotas using the profile option named Allow quota start date validation during publish. The employee hire date is the same as the resource start date.
Quota Assignment

Published Quotas: Explained

When sales managers complete assigning quotas, they publish the quotas to the owners and resources of their child territories. Child territory owners can then view their quotas for the territories they own. And in turn they assign and publish quotas to the owners and resources of their child territories. Publishing your quotas also sends notifications containing resource quota information to an incentive compensation analyst. The territory owner and the manager of the sales manager who published the quota receive notifications that the quotas are published.

You can select one or more territories to publish. When you publish a territory, you publish:

- The territory quota
- The resource quotas for all sales goals for the selected territory
- The quotas assigned to finer time periods

If you double-click the publish button, then the first click publishes the selected territory. The second click publishes the child territories of the selected territory.

If you did not apply seasonality to quotas, then the publishing process applies the seasonality factor that was defined in the sales quota plan for the territory. If there are no seasonality factor groups defined, then seasonality factors are not applied and there is no granular time period quota. Excluded territories can’t be published. Publishing fails if the selected territory or any territory resource has no quota.

Tip: Save time entering period quotas. Seasonality gets applied automatically on publish if you haven’t manually entered period quotas.

Allocating Quotas

You can allocate quotas in the Manage Sales Quotas page. Sales administrators can enter and edit territory and owner quotas for any territory quotas that aren’t published. Sales managers can enter and edit child quotas that aren’t published. For territory quotas that aren’t published, you can also:

- Enter or edit a quota for each period
- Apply seasonality factors

Select a parent territory and click Details to use the Edit Sales Quotas page to enter or edit quotas. You can enter annual quotas, period quotas, and apply seasonality to any quotas not published.

Copying Territory Quotas to Resource Quotas

By setting two profile options, the administrator enables the automatic copying of quotas during publishing. Publishing does the following:

- Copies the territory owner’s annual quota for the sales revenue goal to the owner’s resource quota.
- If the owner’s annual resource quota is zero, then publishing copies the territory period quotas to resource period quotas. It overwrites any existing resource period quotas.
Resource Quota and Incentive Compensation: How They Work Together

Compensation plans control how an employee is paid. Salespeople often get paid according to their performance. One tool used to measure performance is the establishment of a sales quota for the salesperson and then the comparison of actual sales for a time period with the salesperson’s quota for that time period. The application notifies the compensation analyst any time quota is published or changed.

This figure shows the sales manager publishing territory resource quotas. The publication sends a notification to the incentive compensation analyst.
Managing Quotas

At the beginning of the year, sales management update their territory definitions and assign salespeople to territories. Senior managers assign quotas to their territories and child territories. The owners of those territories in turn assign quotas to the owners and resources of their child territories. When a manager publishes quotas, the quotas become available to the owners of the child territories. Also, a notification goes to the compensation analyst with the now published quota information.

During a quota plan period, changes occur in territory definitions, resource assignment to territories, and to quota assignments to resources (salespeople). Managers can choose to submit updated quota information to the compensation analyst in the form of a notification.

Sales Goals

A sales goal determines how quota is measured and defines what you want to measure. The sales goal used for a territory owner’s revenue quotas is the Revenue Sales Goal. In order to assign multiple quotas to an individual salesperson or to assign quotas to salespeople other than territory owners, you must use a sales goal other than the Revenue Sales Goal. Following are some examples of sales goal definitions:

- Number of customer visits
- Number of service contracts sold

Notifications to compensation include quotas for each quota-carrying resource for all sales goals. For each salesperson, the notification contains all the annual resource quotas for all applicable goals as well as the period quotas.

Updating Compensation Plans

The compensation analyst creates compensation plans for a specific time period. The analyst uses quota notifications to keep the quota information in the plan correct and up to date. The analyst analyzes the provided information, performs any other research needed, and manually updates the quota plan or rejects the notification. The compensation plan quota status is set to complete when the compensation analyst completes updating the compensation plan.

Sales Quotas Export and Import: Overview

Within a selected quota plan in Manage Sales Quotas, you can select a territory hierarchy within your control and export resource quotas and territory quotas to CSV files. During the quota planning cycle, sales operations users consolidate quota information for the territories that they support and import the new quota allocations.

From the territory quota table in Manage Sales Quotas, go to the Actions list and select Export or Import. You can import data only to quota plans that are active and being tracked.

Territory quotas, territory period quotas, resource quotas, and resource period quotas are exported and imported using the following four CSV files:

- **Territory_Quota.csv**
  The file includes the territory name, parent territory, and territory quota.
- **Territory_Period_Quota.csv**
  The file includes the quota by period (for example, month) for each territory quota.
- **Resource_Quota.csv**
  The file contains the resource quota per sales goal, and related compensation plan notification status.
• Resource_Period_Quota.csv

    The file includes the quota by period (for example, month) for each resource quota.

One or more CSV files must be in a compressed file to be imported.

Incentive Compensation

You can export resource quotas and resource period quotas to send to incentive compensation for importing performance goals.

1. Navigate to Territories and Quotas.
2. In the Tasks pane, click **Manage Sales Quotas**.
3. Select an active sales quota plan.
4. Select the territory that you want to export. The export includes all descendants of the selected territory and all resources for each territory.
5. From that Actions menu, select **Export**, then **Export Sales Quotas**.
6. From the Actions menu, select **Export**, then **View Export Status**.

    The page lists past exports and the status of your export.
7. When the process succeeds and you see your export compressed file in the list.
8. Click the compressed file link and save the file.
9. Click **OK**.

Using Export and Import to Modify Sales Quotas: Procedure

You can export sales quotas, make additions and changes, and import your quota information to the active sales quota plan.

**Prerequisites**

You need the following prerequisites:

- You must have an active sales quota plan. Your sales administrator creates sales quota plans. You don’t need existing quotas in order to export. The export provides the CSV files you use for importing quotas.
- You must have a duty role that is mapped to the ORA_ZBS_SALES_ADMINISTRATOR_JOB privilege.

**Exporting Quotas**

Export quotas for a selected territory and its descendants.

1. Navigate to Territories and Quotas.
2. In the Tasks pane, click **Manage Sales Quotas**.
3. Select an active sales quota plan.
4. Select the territory that you want to export. The export includes all descendants of the selected territory.
5. From that Actions menu, select **Export**, then **Export Sales Quotas**.
6. From the Actions menu, select **Export**, then **View Export Status**.
The page lists past exports and the status of your export.

7. Click **Refresh** until the process succeeds and you see your export compressed file in the list.
8. Click the compressed file link and save the file.
9. Click **OK**.

**Modifying Sales Quota Data**

Use your spreadsheet program to add, change, and delete quota information to the CSV files used for quota import. You can modify any one file or all four files.

1. Extract the files contained in the compressed file.

   The four files are:
   
   - **Territory_Quota.csv**
     
     The file includes the territory name, parent territory, and territory quota.
   
   - **Territory_Period_Quota.csv**
     
     The file includes the quota by period (for example, month) for each territory quota.
   
   - **Resource_Quota.csv**
     
     The file contains the resource quota per sales goal, and related compensation plan notification status.
   
   - **Resource_Period_Quota.csv**
     
     The file includes the quota by period (for example, month) for each resource quota.

2. Open your CSV files in a spreadsheet program. You can open Territory Quota and Resource Quota files directly. But you must import the Territory Period Quota and Resource Period Quota files to Excel in order to retain the original date format for the start date and end date fields.

   a. Open a new spreadsheet.
   
   b. From the Data menu, select **Get External Data From Text**.
   
   c. Select the CSV file.
   
   d. Click **Import**.
   
   e. Select **Delimited** and click **Next**.
   
   f. Select **Comma**, deselect any other delimiters, and click **Next**.
   
   g. In the Data Preview region, scroll to the **Period Name** column and select it.
   
   h. Under **Column data format** select **Text**.
   
   i. Click **Finish**.
The period name should appear in your spreadsheet as hyphenated text, for example 12-20. If you open the file without using import, Excel converts this name to a date, which causes an error when you import the file.

3. Update the files with your additions or changes. Because you are able to add or delete resources in the Resource Quota tab of the Edit Sales Quotas UI, the Resource Quota file contains the Action column. In this column, enter **ADD**, **UPDATE**, or **DELETE** to each row you change.

4. Save your CSV files.

⚠️ **Caution:** Don’t change the names of the CSV files.

5. Zip your modified CSV files together, or compress a single file if you modified only one. You can use any name for the compressed file.

### Importing Quotas

You can import any one of the CSV files, up to all four files. No matter how many files you want to import, they must be in a compressed file. You don’t need to select a territory when you import, but security applies during the import. For example, you can’t make changes to quotas for territories you can’t access.

1. Go to Manage Sales Quotas.
2. In the Edit Sales Quotas region, click the **Actions** menu.
3. Select **Import**, then **Import Sales Quotas**.
4. Browse and select the compressed file that contains your updated files.
5. Click **OK** to submit the file.
6. Click **OK** to close the information message.
7. From the Actions menu, select **Import**, then **View Import Status**.
8. Click **Refresh** to update the status until the process completes.
9. If you see a rejected data file, click the link to save the reject compressed file.

10. Extract the CSV files from the rejected compressed file.
The files contain data that could not be imported.

11. Open each CSV file and correct the data.
12. Zip one or more files and reimport the compressed file.
13. To see your imported data in Manage Sales Quotas, refresh your screen by navigating away from it and then back.

What's a variance?

The variance is the difference between the adjusted quota amount for the parent territory and the rolled up total amount from the child territory quotas. The variance can be spread, meaning it gets added to the child territories.

What's an adjustment?

An adjustment is the amount that territory owners, or sales managers who have child territories, add to the territory quota assigned to the territory they own. The territory owner can then allocate the adjusted territory quota to child territories.

Quota Import References

Territory Quota Import File Reference

The following table lists the columns included in the Territory Quota file along with descriptions. Territory Quota and Allocation Comments fields will be updated from the file. The rest of the required fields are used for validation.

<table>
<thead>
<tr>
<th>Import Field Name</th>
<th>Description</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>QuotaPlanName</td>
<td>The sales quota plan containing the territory quota. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>ParentTerritoryName</td>
<td>The name of the parent territory for the territory that is assigned the quota.</td>
<td>No</td>
</tr>
<tr>
<td>TerritoryNumber</td>
<td>External territory identifier. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>TerritoryName</td>
<td>Name of the territory.</td>
<td>No</td>
</tr>
<tr>
<td>StartDate</td>
<td>The start date of the quota period in MM/DD/YY date format.</td>
<td>No</td>
</tr>
<tr>
<td>EndDate</td>
<td>The end date of the quota period in MM/DD/YY date format.</td>
<td>No</td>
</tr>
<tr>
<td>TerritoryQuota</td>
<td>Quota assigned to this territory.</td>
<td>No</td>
</tr>
<tr>
<td>Currency</td>
<td>CRM corporate currency</td>
<td>No</td>
</tr>
</tbody>
</table>
### Import Field Name | Description | Required
---|---|---
Status | Status of this territory quota: PUBLISHED, NON-PUBLISHED, or PENDING REVISION. | No
PublishedDate | Date territory quota is published, in MM/DD/YY date format. | No
AllocationComments | Allocation comments for the quota. | No

**Territory Period Quota Import File Reference**

The following table lists the columns included in the Territory Period Quota file along with descriptions. The Territory Period Quota field will be updated from the file. The rest of the required fields are used for validation.

<table>
<thead>
<tr>
<th>Import Field Name</th>
<th>Description</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>QuotaPlanName</td>
<td>The sales quota plan containing the territory quota. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>ParentTerritoryName</td>
<td>The name of the parent territory for the territory that is assigned the quota.</td>
<td>No</td>
</tr>
<tr>
<td>TerritoryNumber</td>
<td>External territory identifier. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>TerritoryName</td>
<td>Name of the territory.</td>
<td>No</td>
</tr>
<tr>
<td>PeriodName</td>
<td>Name of the period from GL_PERIODS. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>StartDate</td>
<td>The start date of the quota period.</td>
<td>No</td>
</tr>
<tr>
<td>EndDate</td>
<td>The end date of the quota period.</td>
<td>No</td>
</tr>
<tr>
<td>TerritoryPeriodQuota</td>
<td>Quota assigned to specific period.</td>
<td>No</td>
</tr>
</tbody>
</table>

**Resource Quota Import File Reference**

The following table lists the columns included in the Resource Quota file along with descriptions. Resource Quota and Allocation Comments fields will be updated from the file. The rest of the required fields are used for validation.
<table>
<thead>
<tr>
<th>Import Field Name</th>
<th>Description</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Action Code: Allowed values are INSERT, UPDATE, and DELETE.</td>
<td>No</td>
</tr>
<tr>
<td>QuotaPlanName</td>
<td>The sales quota plan containing the territory quota. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>ParentTerritoryName</td>
<td>The name of the parent territory for the territory that is assigned the quota.</td>
<td>No</td>
</tr>
<tr>
<td>TerritoryNumber</td>
<td>External territory identifier. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>TerritoryName</td>
<td>Name of the territory.</td>
<td>No</td>
</tr>
<tr>
<td>ResourceName</td>
<td>Salesperson’s name.</td>
<td>No</td>
</tr>
<tr>
<td>ResourceEmail</td>
<td>Salesperson’s e-mail address. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>GoalNumber</td>
<td>Sales goal number. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>GoalName</td>
<td>Sales goal assigned to resource quota.</td>
<td>No</td>
</tr>
<tr>
<td>Currency</td>
<td>CRM corporate currency.</td>
<td>No</td>
</tr>
<tr>
<td>ResourceQuota</td>
<td>Quota assigned to salesperson and associated with specific sales goal.</td>
<td>No</td>
</tr>
<tr>
<td>UnitOfMeasure</td>
<td>Resource quota UOM: Quantity or Amount.</td>
<td>No</td>
</tr>
<tr>
<td>StartDate</td>
<td>Resource quota start date.</td>
<td>No</td>
</tr>
<tr>
<td>EndDate</td>
<td>Resource quota end date.</td>
<td>No</td>
</tr>
<tr>
<td>AllocationComments</td>
<td>Comments about the resource quota allocation.</td>
<td>No</td>
</tr>
<tr>
<td>CompensationPlanStatus</td>
<td>The status of quota being incorporated into the salesperson’s compensation plan.</td>
<td>No</td>
</tr>
<tr>
<td>CompensationPlanSubmittedDate</td>
<td>The date that the quota was submitted to the compensation analyst in order for the compensation plan to be updated.</td>
<td>No</td>
</tr>
</tbody>
</table>
Resource Period Quota Import File Reference

The following table lists the columns included in the Resource Period Quota file along with descriptions. The Resource Period Quota field will be updated from the file. The rest of the required fields are used for validation.

<table>
<thead>
<tr>
<th>Import Field Name</th>
<th>Description</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>QuotaPlanName</td>
<td>The sales quota plan containing the resource quota. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>ParentTerritoryName</td>
<td>The name of the parent territory for the territory that is assigned the quota.</td>
<td>No</td>
</tr>
<tr>
<td>TerritoryNumber</td>
<td>External territory identifier. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>TerritoryName</td>
<td>Name of the territory.</td>
<td>No</td>
</tr>
<tr>
<td>ResourceName</td>
<td>Salesperson’s name.</td>
<td>No</td>
</tr>
<tr>
<td>ResourceEmail</td>
<td>Salesperson’s e-mail address. Mandatory attribute and acts as a Unique User Key.</td>
<td>Yes</td>
</tr>
<tr>
<td>GoalNumber</td>
<td>Sales goal number. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>GoalName</td>
<td>Sales goal assigned to resource quota.</td>
<td>No</td>
</tr>
<tr>
<td>PeriodName</td>
<td>Name of the period from GL_PERIODS. Unique user key.</td>
<td>Yes</td>
</tr>
<tr>
<td>StartDate</td>
<td>Start date of the period.</td>
<td>No</td>
</tr>
<tr>
<td>EndDate</td>
<td>End date of the period.</td>
<td>No</td>
</tr>
<tr>
<td>ResourcePeriodQuota</td>
<td>Resource Quota assigned to specific period.</td>
<td>No</td>
</tr>
<tr>
<td>UnitOfMeasure</td>
<td>Resource quota UOM: Quantity or Amount.</td>
<td>No</td>
</tr>
<tr>
<td>Currency</td>
<td>CRM corporate currency.</td>
<td>No</td>
</tr>
<tr>
<td>AllocationComments</td>
<td>Comments about the resource quota allocation.</td>
<td>No</td>
</tr>
</tbody>
</table>
Chapter 25

Setting Up Partner Relationship Management

Partner Relationship Management: Overview

Channel organizations use Oracle Sales Cloud Partner Relationship Management to recruit channel partners and sell products and services through them to grow their business. Both channel organizations and partners use partner management to align their businesses so they can more successfully close deals. Channel organizations also use partner management to analyze partner performance, thus optimizing their time and financial investments in their partners.

Oracle Sales Cloud utilizes streamlined partner relationship management and indirect sales processes to increase the value of your partner network. Channel managers have their own work area to manage Partners, Enrollments, Programs, Marketing Development Funds (MDF), and Partner Announcements. Partner salespeople have their own partner portal, where they can qualify leads, register opportunities, request MDF aid, and view announcements from their channel organization.

How Partner Relationship Management Is Organized

Oracle Sales Cloud partner relationship management functionality is organized in the following areas:

- Partners
- Enrollments
- Programs
- MDF
- Deal Registrations
- Partner Announcements
- Channel Dashboard

Partners

Channel managers can perform overall partner management, including signing up new partners and providing them with portal access, managing all aspects of the partner account, including:

- partner profile information
- partner contacts
- partner teams
- partner leads
- partner deal registrations
- partner opportunities
- partner relationships
- partner business plans and objectives
• partner programs
• partner program enrollments
• MDF
• partner notes
• partner activities

Channel managers have their own dashboard where they can view a wide range of information about each partner, including the leads, opportunities, and deal registrations that each partner generates. As well, partners can access their own partner portal to manage their:

• Partners
• MDF
• Lead Qualifications
• Deal Registrations
• Opportunities
• Activities

Enrollments

A partner program enrollment is the enrollment of a partner in a specific partner program. Active enrollment in partner programs can make partners eligible for benefits and incentives that come with the partner program. Enrollments allow the channel team to track and manage which partner users are taking part in the partner programs offered by the brand owner or channel organization.

Programs

Partner programs are programs that the brand owner or channel organization create to provide benefits to approved partner enrollees. Partner programs help brand owners and other channel organizations to encourage their partners, such as resellers, manufacturers, or distributors to sell their products or services.

Brand owners and other channel organizations define partner programs to segment their partners and provide benefits based on partner competencies and expected revenue from partners. Programs have an eligibility criteria and associated benefits. The partner program describes the requirements and benefits for partners when they are members of the program.

Marketing Development Funds (MDF)

Market Development Funds (MDF) are funds that brand owners make available to partners, so the partners can market the brand owner’s products in specific geographical areas, or so the partners can market the brand in general. MDF allows brand owners to manage the full cycle associated to marketing development funds, from creating and managing MDF budgets to managing MDF requests and claims submitted by partners.
Deal Registrations

Deal registration is the process partners use to request exclusive rights to a deal from their brand owner or channel organization. This process provides partners with the means to inform the brand owner or channel organization about a deal, and by being first to register that deal, the partners receive priority for the opportunity if their deal registration is approved. Deal registrations are less speculative than leads, but more speculative than opportunities.

Partner Announcements

Brand owners or channel organizations can send announcements that appear on the partner portal home page. These announcements communicate important information that the brand owner or channel sales team want partner users to know.

Channel Dashboard

Oracle Sales Cloud provides a dashboard for channel managers so that they are apprised of critical sales and partner activity information, including required action information and detailed reports on one page. The channel dashboard allows channel managers to track their quota versus their actual. The channel dashboard includes key performance indicators for the following:

- Actual revenue versus quota
- Top opportunities
- Stalled opportunities
- Open pipeline revenue
- Partner status
- Partner performance

Channel Sales

Setting Up Partner Relationship Management for Channel Sales: Overview

To take advantage of partner channel sales capabilities in Oracle Sales Cloud, you must perform some customization tasks that enable various partner-related aspects of the user interface. Other setup tasks may be required depending on your business needs.

> **Note:** Customization and setup tasks require that you sign in as a user with administrative privileges, such as the sales administrator or the application implementation consultant.
The following table describes the high-level tasks to set up partner channel sales capabilities. Refer to the related topics for more information.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>Where Performed</th>
<th>Related Topics</th>
</tr>
</thead>
</table>
| Customize UI labels                            | Customize field display labels for partner users.                            | Application Composer | • Customizing Pages for Channel Sales  
• Setting Up Partner Channel Sales in Leads |
| Customize page layout for fields tied to specific roles | Use dynamic layout by role when you have fields that always need to be exposed for a role, and these fields aren’t linked by validation logic. | Application Composer | • Customizing Pages for Channel Sales  
• Setting Up Partner Channel Sales in Leads  
• Setting Up Partner Channel Sales in Leads  
• Setting Up Partner Channel Sales in Opportunities |
| Customize page layout for standard fields with validation logic | Use when you want to display hidden, standard fields that have linked logical dependencies. | Page Composer        | • Customizing Pages for Channel Sales  
• Setting Up Partner Channel Sales in Leads |
| Customize landing page for a role              | Customize the list (landing) page layout for an object by adding fields or columns you want to expose for a specific partner role. | Application Composer | • Customizing Pages for Channel Sales  
• Setting Up Partner Channel Sales in Leads |
| Turn off the new fields you added in Application Composer for every role that does not need them | Application Composer does not support editing object list (landing page) tables by role, so you must disable any new fields you added in Application Composer for every role that does not need them. | Page Composer        | • Customizing Pages for Channel Sales  
• Setting Up Partner Channel Sales in Leads |
| Customize saved searches                        | Create custom saved searches (saved lists) for end users to speed and filter their searches. | Page Composer        | • Setting Up Partner Channel Sales in Leads |
| Perform additional standard setups for Leads integration | Set profile options, confirm assignment rules, and set up assessment templates. | Setup and Maintenance work area, Lead Management offering | Setting Up Partner Channel Sales in Leads |
| Perform additional standard setups for Opportunities integration | Set profile options, confirm assignment rules, and set up assessment templates. | Setup and Maintenance work area, Sales offering | Setting Up Partner Channel Sales in Opportunities |
| Create custom workflow to notify users of partner opportunity actions | Create a custom workflow that notifies partner users when an opportunity is acted upon. | Application Composer | Creating a Custom Workflow for Channel Sales: Procedure |
Customizing Additional Partner Relationship Management Objects for Channel Sales

While the content in this section does not directly support the two business use cases discussed in this guide, if you plan to use additional partner relationship management objects to extend your channel sales capabilities you must use the BPM Worklist to customize the approval workflow so that requests go to the correct resource for approval for the following business objects:

- deal registrations
- partner registrations
- partner program enrollments
- MDF

Changing Security to Enable Notifications Using E-Mail Templates

When an approver approves or rejects a partner self-registration request, a web service operation changes the partner record from Prospective to Registered or Rejected status and the approver also sends an e-mail notification that alerts the partner to this status change. This web service operation utilizes a special user, FUSION_APPS_CRM_SELFSERVICE_ADF_APPID, to invoke this operation during the partner self-registration process. If e-mail templates have been configured for these notifications regarding the registration request status change, the special user must initiate the process. However, as preconfigured, this special user does not have the necessary functional security permissions to access these e-mail templates.

Follow these steps to add the functional security policy to the FUSION_APPS_CRM_SELFSERVICE_ADF_APPID user.

1. Sign in to APM with your sales administrator credentials.
2. On the left side of the page, specify the search filter as Search for Users in Global Scope and the username as FUSION_APPS_CRM_SELFSERVICE_ADF_APPID.
3. Click Search.
4. Select the row returned in the search results table and click Open.
5. On the User Details page, click the Application Role Assignments subtab.
6. Click Map (+).
7. On the dialog that appears, select the Application Name IDCCS.
8. Specify CRMRead as the display name for the application role, and click Search.
9. In the search results table, select the row that is returned, and click Map Roles. The Map Application Roles to User dialog window closes and you return to the User Details UI.
10. Verify your changes.
11. Sign out of APM for your changes to take effect.

Customizing Pages for Channel Sales

Setting up channel sales functionality in Oracle Sales Cloud involves customizing the user interface. By default, Oracle Sales Cloud partner relationship management UIs are configured for the partner roles, however you must customize these UI pages for the channel roles. For example, a common customization is adding a Partner column to an object’s landing page so that the channel account manager knows which partner the record belongs to.

This topic provides some examples of what you may want to customize. Your unique business requirements, of course, will dictate what you actually customize for partner pages.
Creating a Sandbox

Before you can customize standard objects, you must create a sandbox. Use these steps to create your sandbox.

1. Sign in with your Sales Administrator or Application Implementation Consultant credentials.
2. Click the Settings and Actions menu icon to the right of your name in the upper right-hand corner of the page.
3. From the Settings and Actions list, click Manage Sandboxes.
4. Click the **New** icon (+) or from the Actions menu, select **New**.
5. In the Sandbox Name field, type a name for your sandbox.
6. Click **Save and Close**.

   You should see your sandbox displayed in the list of available sandboxes.
7. Select your sandbox from the list and click **Set as Active**.

Customize Pages

You can add or hide fields or field groups (regions) in the Partner pages. The customization tool you use depends on what you are trying to accomplish.

The following table lists some scenarios, which customization tool to use, and examples.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Customization Tool</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>You have fields or field groups on a create page or edit (details) page</td>
<td>Application Composer</td>
<td>• On the Edit Lead page, the Channel Manager field needs to be exposed for users with partner roles only.</td>
</tr>
<tr>
<td>that always need to be exposed for a specific role. You can create</td>
<td></td>
<td>• On the Create Lead page, the Partner field needs to be exposed for channel users only.</td>
</tr>
<tr>
<td>Dynamic Layouts to accomplish this.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>You want to expose one or more Partner Information region fields for</td>
<td>Page Composer</td>
<td>• In the Create Lead page, you want to expose the Partner and Sales Channel fields, but you want Partner to appear only when the Sales Channel is set to Partner.</td>
</tr>
<tr>
<td>specific roles when Sales Channel is set to Partner on a lead.</td>
<td></td>
<td>• In the Edit Lead page, you want to expose Sales Channel field and the Partner Information field group. However, the Partner Information field group should only appear when Sales Channel is set to Partner.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Instead of using Page Composer, you can also accomplish the scenarios above by using dynamic page layouts in Application Composer. See Dynamic Page Layouts: Explained.</td>
</tr>
<tr>
<td>You want to rename fields.</td>
<td>Application Composer</td>
<td>Change Primary Partner to Partner in the Leads pages.</td>
</tr>
</tbody>
</table>

The following table shows examples of fields you may want to expose, and alternate labels you can consider for the field names. Renaming fields is done in the object’s Fields page in Application Composer, and exposing or hiding fields is done in the desired custom page layout in Application Composer for the same object, under the Pages node.
Setting Up Partner Relationship Management

The following is a high-level procedure for exposing fields:

1. Sign in with your Sales Administrator or Application Implementation Consultant credentials.
2. From the Navigator, click **Application Composer** under the Tools category.
3. In the Application list of values, select **Sales**.
   - For Opportunities: Click **Standard Objects, Opportunity, Pages**.
   - For Leads: Click **Standard Objects, Sales Leads, Pages**.
4. On the Simplified Pages tab, edit any custom page layout for the desired type of page, such as the creation page or details (edit) page.
5. From the list of available fields, select the fields you want to expose and move them to the Selected Fields list.
6. Click **Save and Close** to save your changes.

The following is a high-level procedure for renaming fields:

1. Sign in with your Sales Administrator or Application Implementation Consultant credentials.
2. Ensure you are in your sandbox. You should see a small banner showing the name of your sandbox displayed across the top of the page.
3. From the Navigator, click **Application Composer** under the Tools category.
4. In the Application Composer tree, navigate to the Fields area for the object you are customizing:
   - Leads: Select **Sales** in the Application list of values, then click **Standard Objects: Sales Lead: Fields**.
   - Opportunities: Select **Sales** in the Application list of values, then click **Standard Objects: Opportunity: Fields**.
5. Click the **Standard** tab.
6. For each field you want to rename, select the row, click the **Edit** icon, and under Appearance, edit the **Display Label**.
7. Save your changes.

Customize the Landing Page

You can customize the partner landing page table fields and columns for specific partner roles. The customization tool you use depends on whether or not the fields are already preconfigured for the landing page table.

To customize page layouts in Application Composer, navigate to **Standard Objects: Sales Lead: Pages**.

<table>
<thead>
<tr>
<th>Scenario</th>
<th>Customization Tool</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expose any hidden fields or columns that are available for selection in Page Composer in</td>
<td>Page Composer</td>
<td>Add the Partner column to the Leads list page for channel user roles only.</td>
</tr>
</tbody>
</table>
Implementing Sales

Chapter 25
Setting Up Partner Relationship Management

Scenario | Customization Tool | Example
---|---|---
the landing page lists (summary table) for a specific role. | Application Composer | - Expose the Source and Accepted Date columns in the Leads list table in the Leads landing page. You must first add them to the Leads list table and then use Page Composer to add them as fields to the table.

- Add the Partner column to the Opportunities list table in the Opportunities landing page. You must first add them to the Opportunities list table and then use Page Composer to add them as fields to the table.

Begin the process of adding any hidden fields or columns you want to expose in the landing page lists for specific roles, if the fields are not available for selection in Page Composer. | Page Composer | - You have exposed the Source and Accepted Date columns in the Sales Lead table, but you do not want them exposed for any users except regular partner end users.

- You must customize the landing page table layout in Page Composer for every job role that you do not want to expose the Source and Accepted Date columns. In other words, for all nonpartner roles, deselect these two columns on the Leads landing page table. (Note that deselecting these fields at the Site layer in Page Composer will make them unavailable at the Job Role layer, even if you have added them in Application Composer.)

Complete the process of adding any hidden fields or columns you want to expose in the landing page lists for specific roles, if the fields are not available for selection in Page Composer. | | 

For more information, see the topics, Setting Up Partner Channel Sales in Leads and Setting Up Partner Channel Sales in Opportunities.

Create Saved Searches for Specific Roles

You can create custom saved searches (also called saved lists) for specific partner roles. For example, you can create a saved search for all users with the Partner Sales Representative role using criteria that these users would typically need, and another one for users with the Channel Sales Manager role using the criteria that they would typically need. You use Page Composer to create the custom saved searches.

For more information, see the topics, Setting Up Partner Channel Sales in Leads and Setting Up Partner Channel Sales in Opportunities.

Setting Up Partner Channel Sales in Leads

To fully utilize Oracle Sales Cloud partner relationship management for channel sales execution in leads, you must perform several configuration procedures. Some of these procedures may include:

- Customizing page layouts to add, remove, or reorder fields
- Associating page layouts with specific user roles
Customizing Page Layout for Leads

Following is a sample procedure for creating custom layouts for the Leads pages for different user types.

1. With a sandbox active, navigate to Application Composer: Navigator, Tools, Application Composer.
2. In the Application list of values, select Marketing.
3. Navigate to Lead pages: Select Standard Objects, Sales Lead, and then click Pages.
4. Ensure that the Simplified Pages tab is active.
5. In the Creation Page Layouts section, edit any custom layout. If none exists, then duplicate the standard layout and edit the resulting custom layout.
6. Edit the Fuse Lead Create page region. Make following changes to the layout:
   - Add the field, PartnerOwnerName. (You will rename this field to Channel Manager later.)
   - Reorder the fields so that Attachments is before Status.
7. Save your changes.
8. Associate the layout with the appropriate user roles. Select the layout and click the Role list of values to associate the following user roles with the layout:
   - Partner Administrator
   - Partner Sales Manager
   - Partner Sales Representative
9. Next, create a custom layout for the Edit Lead page. Ensure you are in the Simplified Pages tab. In the Details Page Layouts section, edit any custom layout. If none exists, then duplicate the standard layout and edit the resulting custom layout.
10. In the Summary subtab, edit the Summary region.
11. Make the following changes:
    - Add the field PartnerOwnerName. (You will rename this field to Channel Manager later.)
    - Reorder the fields so that Attachments is before Status.
12. Associate the layout with the appropriate user roles. In the Details Page Layouts region, select the layout and click the Role list of values to associate the following user roles with the layout:
    - Partner Administrator
    - Partner Sales Manager
    - Partner Sales Representative
13. Make sure the new layout is above the Standard Layout in the table.
14. Test your changes by signing in as a user with one of the roles you associated with the layout.
15. Publish the sandbox.

To modify the layout for channel account manager and channel sales manager:

1. Make a copy of the appropriate layouts you created or modified above and:
   a. Remove PartnerOwnerName in the Summary region.
   b. In the Sales Team subtab, add the Organization field to the Summary Table and move it directly below Team Member.
2. Make sure the new layout is above the Standard Layout in the table but below the partner user layout.

**Renaming Field Labels**

You can rename field names from their default values to new values, as needed.

   a. Click the Standard tab.
   b. For each field to be renamed, select the row, and click Edit the Selected Field.
   c. Under Appearance, edit the display labels. Following is a sample of the fields you may want to customize.

<table>
<thead>
<tr>
<th>Default Field Name</th>
<th>Custom Display Label</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartnerLevelMeaning</td>
<td>Partner Level</td>
</tr>
<tr>
<td>PartnerOwnerName</td>
<td>Channel Manager</td>
</tr>
<tr>
<td>Primary Partner</td>
<td>Partner</td>
</tr>
</tbody>
</table>

   d. Save your changes.

**Additional Customizations in Page Composer**

You may want to make additional customizations in Page Composer for the Sales Lead object. This section presents some example customizations you would make for both channel and partner salesperson roles.

For Partner Sales Representative, Partner Sales Manager, and Partner Administrator roles:

- Customize the Leads landing page table layout by reordering, removing, or adding columns.

For the channel account manager and channel sales manager:

- Add the Partner column.
- Move the Age in Days column to the right of the Name column.

For partners:

- Add the Source and Accepted Date columns.

**Creating Custom Saved Searches**

You may want to create custom saved searches for partner users. This section presents some example customizations you would make the both channel and partner salesperson roles.

To find opportunities for Channel Account Manager: "Opportunities where I am on the team" should be default.
To find leads for the Channel Account Manager, expose the following fields in the search:

- Pending Distribution
- Pending Acceptance
- Accepted Partner Leads

To find leads for partners, expose the following fields in the search:

- Brand Owner Assigned Leads
- My Open Accepted Leads
- All Accepted Leads

Additional Setup Steps

Additional setup steps may be required, depending on your business needs, as described below. To perform these setup steps, sign in to the Setup and Maintenance work area as a user with Application Implementation Consultant or Sales Administrator role. Use the Lead Management offering, with Sales Leads as your functional area.

<table>
<thead>
<tr>
<th>Task Name</th>
<th>What You Need To Do</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create assessment templates and set profile option for assessment templates</td>
<td>Create assessment templates: Manage Sales Lead Assessment Template&lt;br&gt;Set the following profile option: Advanced Lead Qualification Enabled - Indirect Leads. Specify the default sales lead assessment template to be used in lead qualification for leads with the Sales Channel set to Partner. The default value is blank. &lt;br&gt;See the assessment topics for more information.</td>
</tr>
<tr>
<td>Set copy map profile options</td>
<td>Profile display name: Partner Lead to Opportunity Mapping&lt;br&gt;Change this value if you have defined custom field mapping for partner lead conversion that differs from the default mapping. This applies for both partner and direct sales leads. The default value is Copy Lead To Opportunity Map.</td>
</tr>
<tr>
<td>Manage lead assignment rules</td>
<td>Ensure that automated lead assignment to partners is set up. See the work assignment topics for more information. If using territory-based assignment, you must set up Partner territories and Channel Sales Manager territories. See the territories topics for more information on territories setup.</td>
</tr>
</tbody>
</table>

Setting Up Channel Sales in Opportunities

To fully utilize Oracle Sales Cloud partner relationship management for channel sales execution in opportunities, you must perform several configuration procedures. These procedures include:

- Customizing page layouts to add, remove, or reorder fields
- Associating page layouts with specific user roles
- Renaming fields
- Creating assessment templates
- Validating default assignment type used
- Defining assignment rules
• Setting up channel territories
• Define the opportunity sales method using the Define Sales Methods task.

The exact tasks depend upon your unique business requirements.

**Note:** Customization tasks require that you sign in as a user with administrative privileges, such as the sales administrator or the application implementation consultant. For additional details and procedures on customizing the applications, see the Oracle Sales Cloud - Customizing Sales guide.

### Customizing Page Layout for Partner Users

Following is a sample procedure for creating a custom layout for the opportunity details page for partner users, such as Partner Sales Representative and Partner Sales Manager.

1. With a sandbox active, navigate to Application Composer: **Navigator, Tools, Application Composer**.
2. In the Application list of values, select **Sales**.
3. Navigate to opportunity pages: Select **Standard Objects, Opportunities**, and then click **Pages**.
4. Ensure that the **Simplified Pages** tab is active.
5. In the **Details Page Layouts** section, make a copy of the Standard Layout. Name the copy something meaningful, like Partner User Layout.
6. Edit the layout.
7. Make following changes to the layout:
   - In the Summary subtab, edit the Summary region. Add the **Channel Manager** field.
   - In the Summary subtab, edit the Summary region. Add the **Registered** field.
   - In the Summary subtab, edit the Revenue Table. Add the **Discount** field.
8. Save your changes and click **Done**.
9. Next, associate the partner layout with the appropriate user roles. In the **Details Page Layouts** region, select the partner user layout and click the **Role** list of values to associate the following roles with the layout:
   - Partner Administrator
   - Partner Sales Manager
   - Partner Sales Representative
10. Test your changes by signing in as a user with one of the roles you associated with the layout.
11. Publish the sandbox.

### Customizing Page Layout for Channel Account Managers

Following is a sample procedure for creating a custom layout for the opportunity details page for users with the Channel Account Manager role.

1. With a sandbox active, navigate to Application Composer: **Navigator, Tools, Application Composer**.
2. In the Application list of values, select **Sales**.
3. Navigate to opportunity pages: Select **Standard Objects, Opportunities**, and then click **Pages**.
4. Ensure that the **Simplified Pages** tab is active.
5. In the **Details Page Layouts** section, make a copy of the Standard Layout. Name it something meaningful, such as Channel Manager Layout.
6. Edit the layout.
7. Make following changes to the layout:
   - In the landing page, add the Partner column to the table.
8. In the Summary subtab, edit the Revenue Table. Add the Discount field.

9. Next, associate the channel manager layout with the appropriate user roles. In the Details Page Layouts region, select the channel manager layout and click the Role list of values to associate the following roles with the layout:
   - Channel Account Manager
   - Channel Sales Manager

10. Test your changes by signing in as a user with one of the roles you associated with the layout.

11. Publish the sandbox.

**Note:** Without customization, users with the Channel Account Manager and Channel Sales Manager roles can already see the Primary Partner field in the opportunity details page, as well as the Partners subtab. These are implemented using security privileges.

### Additional Setup Steps

Additional setup steps may be required, depending on your business needs, as described below. To perform these setup steps, sign in to the Setup and Maintenance work area as a user with Application Implementation Consultant or Sales Administrator role. Use the Sales offering, with Opportunity Management as your functional area.

<table>
<thead>
<tr>
<th>Setup Step</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create and activate assessment templates</td>
<td>Task Name: Manage Opportunity Assessment Templates&lt;br&gt;See the assessment topics for more information.</td>
</tr>
</tbody>
</table>
| Configure partner team resource access level and function | Task Name: Manage Opportunity Profile Options<br>Verify the values for the following profile options:
- Partner Resource Sales Team Access Level Default (MOO_DEFAULT_PARTNER_ACCESS_LEVEL): Default access level for partner resources added to the opportunity team. The default is No Access.
- Partner Resource Sales Team Function Default (MOO_DEFAULT_PARTNER_TEAM_MEMBER_FUNCTION): Default function for partner resources added to the opportunity sales team. The default value is Integrator. Ensure that automated opportunity assignment for partners is set up. If using territory-based assignment, you must set up Channel Sales Manager territories. See the territories topics for more information on territories setup. |

### User Access to Partner Opportunities: Explained

To gain access to the Partners tab and the Primary Partner field in the Edit Opportunity page, users must have the Manage Opportunity Partners privilege included in their job role.

**Note:** If an administrator used Application Composer to remove the FusePartnerName field from the Edit Opportunity layout, then users will not see the Partners tab and the Primary Partner field even if their job role includes the Manage Opportunity Partners privilege.
Duties and Jobs With the Privilege

By default, the Manage Opportunity Partners privilege is assigned to the following three duties:

- Opportunity Channel Administration
- Channel Account Manager
- Channel Sales Manager

By default, these duties are part of the following jobs/duties:

- Sales Administrator
- Customer Relationship Management Application Administrator
- Channel Administration
- Channel Operations Manager
- Channel Partner Portal Administrator
- Channel Account Manager
- Channel Sales Manager

Creating a Custom Workflow for Channel Sales: Procedure

You can create a custom approval workflow so that all partner opportunities can be registered and submitted for approval by channel managers, to avoid channel conflict. You can use the registration status of an opportunity to keep track of where the partner opportunity is in the overall registration process.

Use case: The channel manager is notified (by e-mail or notifications) when a partner user submits an opportunity for registration approval. The partner user (who is the opportunity owner) is notified when the channel manager takes approval action (approve/reject/return) on the opportunity.

Use the following procedure.

1. Sign in as a user with setup privileges, such as Sales Administrator or Application Implementation Consultant.
2. Ensure you are not in your sandbox.
3. From the Navigator, click More... and from the Tools menu, select Application Composer.
4. In the Application field, select Sales.
5. Under Common Setup, click E-Mail Templates.
6. On the E-Mail Templates page, click the Create icon.
7. On the Create E-Mail Template page, do the following:
   - Select Opportunity from the Objects list.
   - Type a name for your template.
   - In the E-Mail Subject region, select the Name field from the Select Fields list and click Insert. This populates [$Name$] into the subject line. Add "submitted for approval" after the [$Name$] syntax.
   - In the E-Mail Body region, select the Name field from the Select Fields list and click Insert. This populates [$Name$] into the body. Add "submitted for approval" after the [$Name$] syntax.
   - Click Save and Close.
8. From the Settings and Actions menu, click Manage Sandboxes and select and activate the sandbox you created earlier.
9. When you are back in your sandbox, from the Navigator, click More... and from the Tools menu, click Application Composer.
10. Select Sales as the Application.
11. Under the Common Setup region in the tree, click Object Workflows.
12. From the Actions menu, click Create.
13. In the Create Object Workflow page:
   - Select Opportunity as the object.
   - Enter a name for the workflow.
   - Under Event Point and Condition, select the radio button for When record is updated.
14. Under conditions, click the green icon for the Groovy editor/builder.
15. In the Expression Builder window, in the free-form text area at the bottom of the window, enter the following Groovy condition:

   ```groovy
   def secCtx = adf.context.getSecurityContext()
   if (secCtx.isUserInRole("ZPM_PARTNER_SALES_MANAGER_JOB") ||
       secCtx.isUserInRole("ZPM_PARTNER_SALES_REPRESENTATIVE_JOB") ||
       secCtx.isUserInRole("ZPM_PARTNER_ADMINISTRATOR_JOB"))
   {if (isAttributeChanged('RegistrationStatus') && RegistrationStatus=='OPTY_SUBMITTED') return true;}
   ```
16. Click OK to save your changes.
17. In the Create Object Workflow page, in the Actions region, click the Create icon for E-mail Notification.
18. In the Create Action: E-Mail Notification page, type a name for your notification.
19. In the Create Action: E-Mail Notification page, in the E-Mail Details region, select the template you created at the beginning of this procedure.
20. In the Create E-Mail Template page:
   - Enter a name for the e-mail template.
   - In the E-Mail Subject region, select the Name field from the Select Fields list of values and click Insert. This populates [$Name$] into the subject line. Add "submitted for approval" after the [$Name$] syntax.
   - In the E-Mail Body region, select the Name field from the Select Fields list of values and click Insert. This populates [$Name$] into the body. Add "submitted for approval" after the [$Name$] syntax.
   - Click Save and Close.
21. Back in the Create Action: E-Mail Notification page: Under Recipient Type, select Specific users to retrieve the Add More Recipients page. Remove the following: Manager of Owner, Opty Team Member - Function: Channel Manager.
22. Click OK.
23. Save changes in the Create Action: E-Mail Notification page.
24. In the Create Object Workflow page, in the Actions region click the create icon for Business Process Flow.
25. In the Create Action: Business Process Flow page:
   - Enter a name for the flow.
   - Click the search icon next to the Project Name field. Search for and select the project ExtnBusinessProcessComposite.
   - Under Inputs, provide the following within single quotes:
     - Approver: provide the ID of the Channel Sales Manager
     - Held EntityStatus field: provide the registration status
     - E-mail Address: provide the e-mail address for the partner user to receive notification once it is approved or rejected.
   - Save your changes.
26. To verify that the approval workflow has been configured correctly, sign in to the Partners UI with your partner user credentials and edit an opportunity.

27. Create and update the opportunity partner registration status to Submit.

28. Click **Save and Close**.

29. Search for the same opportunity to refresh. Verify you receive an e-mail notification.

30. Sign out. Sign back in with your Channel Sales Manager credentials.

You see the opportunity waiting for approval in the work list area of your dashboard.

31. Select the opportunity and click **Approve** or click **Reject**.

32. Sign out. Sign back in with your partner user credentials and navigate to same opportunity. Drill-down to see if the Registration field shows a status of Approved. Check for an e-mail notification.

33. Close the opportunity, updating status and related fields.

**Setting Up Deal Registration for Channel Sales**

Deal registration is a process by which partners request exclusive rights to an opportunity from the brand owner or channel organization. It provides partners with the means to inform the channel organization about a potential opportunity, and then the partners receive priority for that opportunity.

Partners can register deals using their partner portal. These deals are routed to designated channel account managers for approval. In turn, channel account managers can reject or return deal registration requests to partners, asking for additional information or justification. Before approving deals, channel account managers can check for duplicate opportunities to avoid channel conflicts. Once a deal registration is approved, an opportunity is automatically created to track the deal as it progresses through the pipeline.

**Note:** If you want to use the preconfigured deal registration flow, the only task you must perform is to add an approver’s name to the default approver profile option MKL_DEFAULT_DEAL_REGISTRATION_APPROVER.

Oracle Sales Cloud has preconfigured workflows for deal registration; however, to optimize deal registration for a channel sales environment, you should customize the relevant fields and pages for the applicable roles using Application Composer and Page Composer.

As well, simplified activity management pages are optimized for direct sales. You should customize the activities pages to expose deal registration attributes for indirect sales which have deal registration programs.

**Note:** Customization tasks require that you sign in as a user with administrative privileges, such as the sales administrator or the application implementation consultant. For additional details and procedures on customizing the applications, see the Oracle Sales Cloud - Customizing Sales guide.

**Understanding the Preconfigured Deal Registration Flow**

The preconfigured deal registration process flow goes through the following steps:

1. Assignment adds team members and potential approvers to the deal team.

   By default, Oracle Sales Cloud does not include assignment rules for deal registration.

2. If no approver is identified or if the approver can’t be identified on the team, the deal registration is routed to the default approver. The default approver is also identified by the profile option MKL_DEFAULT_DEAL_REGISTRATION_APPROVER.

3. The deal object is retrieved and sent to the human task.

4. The human task uses rules to determine approvers for the deal and then sends notifications.
The approvers then either approve, reject, or return the deal.

When a deal is approved, the deal is converted to an opportunity based on the copy map profile option MKL_DEAL_TO_OPTY_MAPPING_NAME.

Setting Up the Preconfigured Deal Registration Workflow

Sales administrators and implementation consultants must perform the following tasks to set up the preconfigured deal registration workflow:

1. Assign the preconfigured deal registration duty roles to the appropriate resources.
2. Configure your assignment rules.
3. Assign the preconfigured approver profile option to the appropriate deal registration approvers.

The following table provides the profile option names and codes, a description and preconfigured value for each profile option necessary for deal registration.

<table>
<thead>
<tr>
<th>Profile Option Name and Code</th>
<th>Description</th>
<th>Preconfigured Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deal Registration Assignment Mode</td>
<td>This profile option determines if the default assignment mode is rule-based, territory-based, or both.</td>
<td>Rules-based Assignment Only/ORA_RBA</td>
</tr>
<tr>
<td>MKL DEAL DEFAULT ASGN_MODE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource Sales Team Access Level Default for Deal Registration</td>
<td>This profile option determines the default access level that is granted to a resource who is added to the deal registration team. This can be changed later by people who have Full Access to the deal.</td>
<td>200</td>
</tr>
<tr>
<td>MKL DEAL DEFAULT SALES TEAM ACCESS_LEVEL</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assignment Rule for Rule-Based Deal Assignment</td>
<td>This is the profile option you use with rule-based deal assignment.</td>
<td>NULL</td>
</tr>
<tr>
<td>MKL DEAL RBA RULESETGROUP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deal Registration Query Default Number of Days</td>
<td>This profile option determines the start and end dates for the Last Update Date search fields in Deal Registration Search UI.</td>
<td>90</td>
</tr>
<tr>
<td>MKL DEAL SEARCH LAST UPDATED RANGE DEFAULT</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Assignment Rule for Territory-Based Deal Assignment</td>
<td>This is the profile option you use with territory-based deal assignment.</td>
<td>NULL</td>
</tr>
<tr>
<td>MKL DEAL TBA RULESETGROUP</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deal Registration to Opportunity Mapping</td>
<td>This profile option is the name of the copy map that is used to convert a Deal to an Opportunity.</td>
<td>Copy Deal Registration To Opportunity Map</td>
</tr>
<tr>
<td>MKL DEAL TO OPTY MAPPING_NAME</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Use Default Deal Registration Approval Business Process</td>
<td>This profile option determines if you will use the preconfigured deal registration business process flow (MklDealsApprovalProcess). Set this to No only if you are using custom business process flow.</td>
<td>Yes</td>
</tr>
<tr>
<td>MKL DEAL USE DEFAULT APPROVAL_PROC</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Deal Registration Default Approver</td>
<td>This profile option contains the user name of a person to use as the default approver</td>
<td>NULL</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Profile Option Name and Code

<table>
<thead>
<tr>
<th>Profile Option Name and Code</th>
<th>Description</th>
<th>Preconfigured Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>MKL_DEFAULT_DEAL_REGISTRATION_APPROVER</td>
<td>If the Human Task rules do not identify an approver.</td>
<td></td>
</tr>
<tr>
<td>Corporate Currency Default</td>
<td>This profile option controls the type of currency you use in your organization</td>
<td>USD</td>
</tr>
<tr>
<td>ZCA_COMMON_CORPORATE_CURRENCY</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exchange Rate Type Default</td>
<td>This profile option determines the exchange rate type you use in your organization.</td>
<td>Corporate</td>
</tr>
<tr>
<td>ZCA_COMMON_RATE_TYPE</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Setting Up an Optimized Deal Registration Workflow

Sales administrators and application implementation consultants can optimize the deal registration approval and notification workflow to ensure a more robust integration of deal registration functionality. Sales administrators and implementation consultants must perform the following tasks set up an optimized deal registration workflow for partner channel sales:

1. Import or create your partner users, create partner deal teams as appropriate for your business needs, and define partner owners (this task is not specific to deal registration, but it’s required for deal registration to function properly).
2. Define the deal registration assignment rules. There are two types of assignment profile options, rule-based and territory-based. The recommended approach is to use rule-based assignment for deal registration. You designate approvers for each partner deal team you have and assign the deal registrations to the partner on the deal team designated as owner. The rest of the team can also see the deal registration.
3. Define partner deal approvers within each partner deal team. There are preconfigured approval rules, however the recommended approach is to define rules that select the members from the team as approvers. If you want to have multiple approvers, then you must add each approver to the partner deal team as a part of assignment first.
4. Configure notifications for deal registration.
5. Set up the dynamic layout for the channel account manager, partners, and approvers.
6. Add Reject and Return reason code lookups.
7. Identify duplicate opportunities.
8. Define the Copy Map for the deal to opportunity conversion.

### Implementing MDF for Channel Sales: Critical Choices

Oracle Sales Cloud MDF is optimized for partner users. To optimize the user experience for channel managers, you must customize the relevant fields and pages for the relevant roles through Extensibility, with Oracle Application Composer and Oracle Page Composer. Activity management pages are optimized for direct sales. You must customize the activities pages to expose MDF attributes for customers offering MDF programs to their partners.

You must make the appropriate decisions during implementation for the following features that drive MDF request and MDF claim approvals:

- Approval routing rules
- Approval process flows
MDF Requests and MDF Claims Approval Routing Rules

MDF requests and MDF claims submitted by partners must be assigned to appropriate personnel in your organization so they can get access to MDF requests or claims based on their roles. For example, people who are approvers must be assigned properly so they can view, approve, reject, or return an MDF request or an MDF claim.

By default, Oracle Sales Cloud provides commonly needed approval routing rules for MDF requests and MDF claims, however you can create your own approval workflow to route MDF requests and MDF claims to the correct approvers.

MDF Request and MDF Claim Approval Process Flows

The default MDF approval processes should meet most MDF request and MDF claim use cases. However, if you need to customize one or both flows, you can do so by customizing the human task flows included in Oracle Sales Cloud, using the existing business flows as your templates. The templates are: FundRequestApprovalHumanTask for MDF requests and ClaimApprovalHumanTask for MDF claims.

Use these steps to edit the existing business flow templates in the Worklist application.

1. Sign in with your sales administrator credentials.
2. Click the Notification bell icon in the global header.
3. Click More Details, and then click Customer Relationship Management.
4. From the user_name drop-down list, select Administration - Task Configuration.
5. Perform the following steps as needed:
   a. For MDF Requests
      i. Search for Fund% in the search field in the left panel.
      ii. Click the Edit icon in the left panel.
      iii. In the Assignees tab, click inside the MDF Request Stage One Approvers box.
      iv. Click the FundRequestApproval business rule.
      v. Make the changes you need to fit your business needs.
   b. For MDF Claims
      i. Search for Claim% in the search field in the left panel.
      ii. Click the Edit icon in the left panel.
      iii. In the Assignees tab, click inside the MDF Claim Stage One Approvers box.
      iv. Click the ClaimRequestApproval business rule.
      v. Make the changes you need to fit your business needs.
6. Save your changes.

Changing the Number of Stages in an Approval Flow

MDF offers up to five approval stages, with both serial and parallel approvals on each stage for both MDF requests and MDF claims. If you need to add additional approval stages to the MDF request or MDF claim flow, follow these steps:

1. Click the MDF Request or MDF Claim Approval Stage Three box.
2. Deselect the Ignore Participants check box.
3. Click Advanced.
4. Deselect the Ignore Stage check box.
5. Click MDF Request or MDF Claim Approval Stage Three Approvers.
6. Click Advanced.
7. Deselect the Ignore Participants check box.
8. Save your changes.
To remove stages, you can create rules that skip approval levels. For example, use these steps if you want to have one approval stage for MDF claims:

1. Create a new rule that skips stage one.
2. Move this rule so it is the first rule in the UI.
3. Inactivate the first seeded rule.

### Configuring MDF Audit Reporting: Explained

The audit of MDF objects, such as MDF Budgets, MDF Requests, and MDF Claims requires some configuration for channel sales. You must determine who can configure MDF audit and who can run and view the MDF audit report. For example, you can select CRM application administrators to manage the MDF audit policies, and sales administrators or channel operations managers to build, run, and export the audit report for MDF.

The tasks to configure access to the audit setup UI are:

- Create the Duty Role to Manage Audit History
- Create the Policy to Manage Audit History
- Map Job Roles to Manage Audit History

The tasks to configure access to the audit reporting UI are:

- Create the Duty Role to View Audit History
- Create the Policy to View Audit History
- Map Job Roles to View Audit History

For more information and detailed steps to perform these tasks, see the Understanding Audit Policies chapter of the Oracle Sales Cloud Implementing Sales guide.

### Selecting the MDF Objects to be Audited

Users with the job roles configured in the previous tasks can follow these steps to select which MDF attributes are audited.

1. Sign in with the determined job role credentials, such as CRM Application Administrator if that job role was granted access.
2. From the Navigator, select Setup and Maintenance.
3. Search for and select the Manage Audit Policies task.
5. From the list of applications, select Marketing.
6. You should see the following objects under MDFAuditAM:

   a. MDF Budget
      i. MDF Budget Team
      ii. MDF Budget Countries
   
   b. MDF Request
      i. MDF Request Team
   
   c. MDF Claim
      i. MDF Claim Team
      ii. MDF Claim Settlements
7. You can click **Audit Top Node** to activate auditing for all objects in the marketing hierarchy, including all MDF objects.
8. You can click **MDF Audit** to activate auditing for all objects in the MDF hierarchy.
9. You can select the check box for each individual object to activate auditing for that object.

On the right side of the page, you can see a list of all standard and custom attributes for the MDF object you selected.

10. Under Audited Attributes, click the + sign to show the Select and Add Audit Attributes dialog, where you can add attributes to or remove attributes from the list.

### Configuring MDF Pre-Approval Validation: Example

Since brand owners don’t have identical approval processes, MDF provides a flexible and quick way to create pre-approval validations that meet your specific business needs. If your business processes change, you are able to change your validations accordingly.

Sales administrators can use Application Composer to configure custom validations that run before an approver takes action on a submitted MDF request or MDF claim. In this example, a sales administrator for a brand owner creates a validation that ensures MDF requests can only be approved if a budget is associated to the request. When this validation is activated, approvers receive an error message when they try to approve a MDF request that doesn’t have an associated budget.

Each human task action requires a separate validation. After you create the validation in Application Composer, you must create a profile option whose value is the name of the object function that will be invoked when the human task action executes. You can configure validations for the following human task actions:

- Return
- Approve
- Reject
- Withdraw

To create the pre-approval validation, sales administrators must:

- Create the validation in Application Composer as an object function under the MDF request object, server scripts link.
- Create a site level profile option with a value that is the same as the name of the object function that will be invoked.

### Creating and Configuring the Validation

Use the following steps to create and configure a validation for MDF requests that ensures a MDF request can only be approved if a budget is associated to it.

1. Sign in with your sales administrator credentials.
2. Ensure you are in a sandbox.
3. Navigate to **Application Composer**.
4. From the Application list, select **Sales**.
5. From the list of Standard Objects, select **MDF Request**.
6. Select **Server Scripts**, then select **Object Functions**, and click **Create**.
7. On the Object Function page, provide the following:
   - Function Name: type a name for the function, such as `validateMDFRequest`.
   - Return: select **String**.
8. In the Parameters area, click **Create** and provide the following:
   - Name: type a name for the parameter, such as **parameter**.
   - Type: **String**.

9. In the Function Body area, type the following:
   ```groovy
def context = parameter?.tokenize(';='); // Replace ‘parameter’ with whatever parameter name is defined in the object function, in this case it is 'parameter'.

def stage = context[1];
def participant = context[3];
def user = context[5];

if(BudgetId ==null && stage == 'SoaOLabel.RequestBudgetFundRequestApprovalStageTwo'){ // This condition is on the second stage which is final stage for the seeded flow
   return "A Budget must be associated to Fund Request before the final approval"; // Error message to be shown on UI if the validation fails
}

return null; // Return null otherwise, which means the validation is successful.
```

10. Validate the script and click **Save and Close**.

### Creating and Configuring the Profile Option

Use the following steps to create and configure the profile option for the previous validation.

1. Sign in with your sales administrator credentials.
2. Ensure you are in a sandbox.
3. Navigate to **Setup and Maintenance**.
4. Search for and select **Manage Profile Options**.
5. Create a new profile option with the following values:
   - Profile Option Code: MKT_FUNDREQUEST_APPROVE_VALIDATION_OBJFUNC (This is the code for Fund Request approve validation; the codes are predefined for object/action validation and must be defined exactly the same)
   - Profile Display Name: Fund Request Approve Validation Object Function
   - Application/Module: Marketing
   - Start Date: Provide a start date for the validation.
6. Click **Save and Close**.
7. Select the **Enable** check box for the profile option at the Site level only and select the **Updatable** check box at the site level only.
8. Click **Save and Close**.
9. Test the validation by approving the FundRequest without providing the Budget. It should display the message what was returned in the groovy. Once you complete the testing you can publish the sandBox.
Configuring Channel Sales Business Plans and Objectives: Points to Consider

Before configuring your partner business plans, you must decide if you want marketing development fund requests to be visible from the Business Plan interface. You must also decide whether a user can choose a Business Plan in the Activities interface when an activity is created outside the context of a specific Business Plan.

Partner Business Plan Decision Points

The following table provides a list of the decision points and the impact of each decision.

<table>
<thead>
<tr>
<th>Decision</th>
<th>Potential Impact</th>
</tr>
</thead>
<tbody>
<tr>
<td>Should MDF Requests be visible in the Partner Business Plan interface?</td>
<td>If yes, you can use Oracle Application Composer to create a relationship between the business plan and the MDF request, and you can add a new tab MDF Request tab to the Business Plan object.</td>
</tr>
<tr>
<td>Should users be able to select a partner business plan when creating or updating an activity that is outside the context of the specific partner business plan?</td>
<td>If yes, then you must use Oracle Application Composer to expose the standard Business Plan field on the Activities page.</td>
</tr>
</tbody>
</table>

Business Plan and Objective Setup Tasks

Use the following tasks for business plan and objective setup:

1. Manage Standard Lookups
   a. Lookup name: Business Plan Type
      • Lookup code: ORA_ZCA_BUS_PLAN_TYPE
   b. Lookup name: Business Plan Status
      • Lookup code: ORA_ZCA_BUS_PLAN_STATUS
   c. Lookup name: Business Plan Team Member Function
      • Lookup code: ORA_ZCA_BUS_PLAN_TEAM_FUNC

2. Manage Objective Types

Configuring Tiers for Partner Programs: Explained

You can use partner programs without extra configuration. However, if you want to use tiers in your partner programs, then you must do the following:

1. Expose the Tiers field and add it to the partner profile tab.
2. Replicate your current partner levels with the Tiers functionality.
3. Hide Partner Level.
Exposing Tiers and Adding Them to the Partner Profile
Channel operation managers can use the following steps to expose tiers and add them to the partner Profile page.

1. For the Partner Standard Object, do the following:
   - Add the Tier field to the Create Partner page with the Partner: Create page configuration task.
   - Add the Tier field to the Profile tab with the Partner: Edit page configuration task.
2. Save your changes.

Replicating Your Current Partner Levels With Tiers
Channel operation managers can use the Tiers functionality to recreate your partner levels.

Hiding Partner Level
Channel operation managers can use the following steps to hide the Partner Level field.

1. For the Partner Standard Object, do the following:
   - Hide the Level field on the Create Partner page with the Partner: Create page configuration task.
   - Hide the Level field on the Profile tab with the Partner: Edit page configuration task.
2. Save your changes.

Enabling the Service Offering for Partner Service Requests: Explained
Service requests for Partner Relationship Management is included with shipped job roles, but the feature is not automatically available. Some setup is required. Customers must have an Engagement Cloud license before sales administrators can enable the Service offering for them. Sales administrators must enable the Service offering before channel managers and partners can see the Service Request subtab or the Service Request infolet.

Use these steps to enable the Service offering.

1. Sign in with your sales administrator credentials.
2. On the Navigator, click Setup and Maintenance.
3. Click the Service card.
4. In the Administration section, click Configure.
5. Check the Enable for Implementation check box.
6. Click in the Implementation Status column, and from the Edit Implementation Status pop-up, select either the In Progress or Implemented option.
7. Click Done.

Customizing the Service Request Page Layout for Channel Managers and Partner Users: Explained
Sales administrators can use Application Composer to customize the Service Request pages that appear when channel managers and partner users click the Service Request subtab.
The following suggestions show some ways in which sales administrators can customize the layout of the Service Request pages.

- You can clone the default layouts for the Create and Edit Service Request pages, and create a layout for internal users (Channel Account Managers) and another layout for external users (Partner Sales Representatives).
- For the internal user layout, you can add the Partner Account field to the Edit Service Request page and, optionally, you can remove the Account field (which refers to customer’s company).
- For external partner roles, you can change the Partner Account field to read only.
- You can use Groovy script to add logic that automatically populates the Partner Account field and Primary Contact field with the name of the partner’s company and the partner user’s name (respectively) when an external partner role creates a Service Request.
- You can extend the Service Request list page columns to replace the Account column with the Partner Account column, and make this new layout available for appropriate channel sales roles.

**Note:** Some Service Request reference data such as Categories and Product Catalog are shared between the partner-facing and customer-facing flows. Customers implementing both use cases in the same Sales Cloud instance will have partners as well as customer-oriented users seeing the same categories and products in Service Requests.

### Adding the Service Request Subtab to Deal Registration Pages: Explained

The Service Request subtab appears on the Partner pages if the Service offering is enabled for the implementation; however, sales administrators can also add the Service Request subtab to Deal Registration pages.

Sales administrators can use these steps to add the Service Request subtab to Deal Registration pages.

1. Sign in with your sales administrator credentials.
2. Create a custom Deal Registration dynamic choice list field on the Service Request object. Add Deal Registration as related object.
3. Add this new custom Deal Registration dynamic choice list field to the Edit Service Request page.
4. Add a custom Service Request subtab to the Deal Registration (Create subtab, related object).
5. Add relevant Service Request fields, such as Reference Number, Title, Status, Priority, Account, Primary Contact, and Created (include drill-down on the Reference Number).
6. Click the **Show Create** check box.

Users can now see and click the **Create** button to create a new service request.
Chapter 26

Setting Up Social Networking

Setting Up Social Networking: Overview

Social networking features in Oracle Sales Cloud let end users:

- View activity streams on dashboards.
- Follow the daily activities of the people they choose.
- Participate in conversations on social network walls.
- Review and publish files.
- Access group space components, such as discussions, blogs, and wikis.

Within Oracle Sales Cloud, Oracle Social Network, and Oracle WebCenter Spaces work together to provide the functionality.

Enabling Access to Oracle Social Network

To enable end-user access to social components provided by Oracle Social Network, you must enable the relevant business objects, such as opportunities and leads.

You use the Manage Oracle Social Network Objects task list in Setup and Maintenance to enable the business objects and the attributes of those business objects. You can also decide whether new objects are automatically shared in Oracle Social Network or whether they need to be manually shared.

This chapter contains the information needed to enable Oracle Social Network components in Oracle Sales Cloud, as well as some setups for Activity Streams and Oracle WebCenter Spaces. For end-user information, refer to the Oracle Sales Cloud - Using Sales guide. For information on implementing and using the Oracle WebCenter social components, refer to the Oracle Fusion Middleware WebCenter documentation available on Oracle Technology Network (http://www.oracle.com/technetwork/middleware/webcenter).
You can configure whether or not to allow the sharing of all the information in a record or only certain attributes. You can also specify whether records aren't shared automatically and must be manually marked for sharing.

The following procedure uses the opportunity object as the example business object to enable.

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Oracle Social Network Objects task.
   
   The Manage Oracle Social Network Objects page appears.
3. In the list, open the Opportunity Management item and select **Opportunity**.
4. Click the **Enable Object** button.
5. Specify whether you want users to manually integrate each new business object record with Oracle Social Network or have them shared automatically:
   
   - Automatic sharing means that the social object in Oracle Social Network that corresponds to the Oracle Sales Cloud business object is created automatically when the object record is created.
   - Manual sharing means that the Oracle Sales Cloud social object is not created automatically when the object record is created. The record must be explicitly shared to Oracle Social Network by a user in Oracle Sales Cloud.
6. Click **OK** in the <business object>: Enable Object dialog box.
7. Notice that the Opportunity row now includes a Warning icon in the Status column. You still need to enable attributes for the object. See the section, Enabling Opportunity Object Attributes, in this topic.
8. Click **Save**.
9. In the Confirmation window, click **OK**.

### Enabling Opportunity Object Attributes

To enable the attributes you want to make available to share:

1. In the Attributes region of the Manage Oracle Social Network Objects page, ensure that the Opportunity object is selected. Click the **Add** icon.
2. A list of attributes for Opportunity is displayed. The sales manager doesn’t want the Level of Risk and Strategic Value attributes enabled, so select the **Enabled** check box at the top to enable all the attributes, then scroll down and deselect the **Level of Risk** and **Strategic Value** check boxes so they won’t be enabled.
3. Click **OK**.

   Notice that a green check mark now appears in the Opportunity object’s Status column.
4. Click **Save**.

   A dialog box appears, showing your progress. When the process is complete, a confirmation displays.
5. Click **OK**.

### Partner Integration

**Enabling Social Networking for Partners: Explained**

With Oracle Social Network enabled, channel organizations and partners can use the social network to collaborate. Channel organizations can invite their partners to Conversations in Oracle Sales Cloud.
If you have the Oracle Social Network Service Administrator role, use these steps to enable Oracle Social Network for partner users.

1. Sign in to the Oracle Social Network with your Oracle Social Network Administrator credentials.
2. Click Administration.
4. In the Outside Users region, update the Outside Users Whitelist with the email domains for the partners you want to collaborate with.
5. Click Save.

Channel account managers can now invite partners to participate in Conversations.

WebCenter Components

Setting Up WebCenter Spaces: Points to Consider

When setting up Oracle WebCenter Spaces (also known as "group spaces"), you need to be aware of the several setup requirements and options.

Access to Space Components

End users need certain permissions to enable or view group space components, such as discussions and wikis, for the following objects:

- Opportunities: Access is controlled by an opportunity team member with Full access.
- Competitors and reference customers: Typically, a user with the Sales Administrator job role enables competitor and reference customer group space components. This job role includes the required Manage Sales Competitor and Manage Sales Reference functional privileges.

Salespeople and sales managers with View access to an object can view group space components.

Embedding Space Components

For a sales object with embedding enabled, the edit view provides an additional check box to show existing embedded discussions and wikis. Users with Full access can activate the check box to embed discussions and wikis for that object record. Only users with Full access to opportunities, and sales administrators for competitors and references, can see and interact with this check box. It is not visible to other users.

You can allow end users to embed discussions and wikis into business object pages by using the following profile options:

- <Object> Group Space Enabled: Determines whether a particular object, such as an opportunity, has support for embedded components. Example: Opportunity Group Space Enabled.
- <Object> Group Space Template Default: Sets the group space template to use if the object has embedded support (if the value for the profile option above is Y). The available features in a group space depend on the template that was selected when the group space was created. Example: Opportunity Group Space Template Default.

Synchronizing Social Objects
Synchronize Business Objects: Explained

Use Synchronize on the Manage Oracle Social Network Objects page to synchronize business objects. This resends the definitions of business objects having the enablement option as Manual or Automatic to Oracle Social Network.

Use the Synchronize button at the:

- **Business Objects table level**: To resend the definitions of a selected business object to social network. This button is enabled only when you select a row for a business object with the enablement option as Manual or Automatic.
- **Manage Oracle Social Network Objects page level**: To resend the definitions of all business objects with the enablement option as Manual or Automatic to social network.

**Note:** If you had modified any business object enabled for social network and not saved your changes, then on clicking Synchronize, a warning message appears. This message informs you that you have not saved your changes, and you can select one of the following options:
- **Save and Synchronize**: To save the modified business objects, and synchronize the unmodified business objects.
- **Synchronize**: To ignore any unsaved business objects, and only synchronize the unmodified business objects.
- **Cancel**: To cancel the synchronization task.

When do I synchronize business objects?

Run the Synchronize process after you use customization sets to import the setup from the Manage Oracle Social Network Objects page in another environment.

You can also run the process whenever you want to synchronize the settings of business objects with social network without making changes in the Manage Oracle Social Network Objects page.

**Related Topics**

- Using Customization Migration to Move Customizations: Points to Consider

What happens if I synchronize business objects?

When you synchronize business objects, you resend the definitions of business objects having the enablement option as Manual or Automatic to Oracle Social Network.
27 Setting Up Mobile Applications

Setting Up Mobile Applications: Overview

Oracle Applications Cloud offers the following mobile applications that integrate with Oracle Sales Cloud:

- Oracle CX Cloud Mobile
- Oracle Sales Cloud Mobile
- Oracle Mobilytics

This chapter outlines the capabilities of these applications, and provides installation and setup information.

CX Cloud Mobile

Oracle CX Cloud Mobile: Overview

The Oracle CX Cloud Mobile (CX Cloud Mobile) application enables field sales representatives, channel account managers, and partner representatives to manage their day effectively and develop customer relationships using a smartphone. With a task-based user interface and built-in analytics, the CX Cloud Mobile application guides daily sales activities and enables the following activities for sales representatives:

- View appointments.
- View aggregated activities in a visual time line for every customer.
- Log call reports and meeting minutes.
- Create ad hoc call reports and add ad hoc activities.
- Automatically capture outbound calls or e-mails as an activity associated with a customer.
- Accept, qualify and convert leads by age.
- Manage opportunities and product lines.
- Update and collaborate using Oracle Social Network.
- Use simple voice commands to navigate and to search for sales records.
- Attach photos and documents to a record.
- Locate and get directions to nearby opportunities, leads, deal registrations, contacts, partners, and accounts.
- View service request status and updates.
- Review quota attainment, open pipeline, and sales commission reports.
- View sales information while offline.

Furthermore, channel account managers and partner sales representatives can also do the following tasks:

- Submit and approve deal registrations.
- Manage partners and partner contacts.
Migrating from Oracle Sales Cloud Mobile to Oracle CX Cloud Mobile: Explained

Oracle Sales Cloud release 12 introduces a new mobile application called Oracle CX Cloud Mobile (CX Cloud Mobile). This application consolidates functionality from Oracle Sales Cloud Mobile, Oracle Sales Cloud Call Report, and Oracle Sales Cloud Deal Management into a single application. In addition, CX Cloud Mobile also introduces new functionality that is intuitive and simple to use, with a modern look and feel.

As with the R11 mobile applications, CX Cloud Mobile provides many configuration capabilities. However, since the application is built on a different architecture than the R11 applications, it requires that the configurations done in R11 are redone on a R12 or R13 environment as part of the CX Cloud Mobile deployment planning. This document describes the set of configurations that have to be redone as part of deploying the CX Cloud Mobile application.

Mobile Layout Configurations

Oracle Sales Cloud Mobile allows you to configure the mobile application in many different ways; for example, by adding, removing, and reordering fields, adding custom objects and removing a standard object. Administrators use Oracle CRM Application Composer (Application Composer) to manage these configurations. Configurations can be assigned to roles, record type, or advanced expressions.

Oracle CX Cloud Mobile uses very different layout patterns and therefore as part of migrating to the new application, you will need to redo your configurations using the new mobile interface designer within Application Composer. This includes creating dynamic layouts, adding and removing fields to the different layouts, adding and removing custom and standard objects, and reordering fields.

> **Note:** To enable the new mobile interface designer so that you can configure CX Cloud Mobile, you need to set the `ZMS_DISABLE_OSCM` Profile Option value to `ENABLED`.

Analytics

Oracle Sales Cloud Mobile allows administrators to add mobile reports and then configure them to display on either the Analytics top level page or the Analytics tabs, on objects such as Accounts and Opportunities. Administrators use Application Composer to manage these configurations.

Oracle CX Cloud Mobile uses a different approach. For the Analytics page in the CX Cloud Mobile application, users can search the reports and mark them as favorites, so that the reports appear in the favorite reports list. This means that users aren’t dependent on administrators to configure the Analytics page.

Reports that users have marked as favorites in the desktop Analytics page also display in the mobile favorites list. Also, any reports that have been marked as favorites in the CX Cloud Mobile application appear in the desktop Analytics page’s favorites list. Essentially, you will see the same list of reports on the desktop application and mobile Analytics pages.

In CX Cloud Mobile, reports can be added to a sales object’s Analytics tab using Application Composer. Viewing the report can be restricted by role, geographical region, and criteria if required.

Saved Searches on List Views

Oracle Sales Cloud Mobile supports saved searches on the sales object list views. These saved searches are the same ones that are available for the object in the desktop application, and they can be created by a user or an administrator. The saved searches can be made available to all users, or assigned to specific roles using Page Composer.
Oracle CX Cloud Mobile application uses a different architecture and therefore does not share the saved searches with the desktop application. Instead, administrators have the ability to create a separate set of saved searches for the mobile application. These saved searches can be created using the mobile interface designer in Application Composer.

Profile Options

CX Cloud Mobile uses both the existing Sales Cloud Mobile Profile Options and also some new Profile Options that are specific to CX Cloud Mobile. After upgrading to CX Cloud Mobile the Sales Cloud Mobile Profile Option values won’t be changed, so you won’t need to update these. You will need to set the new Profile Option values and a list of these can be found in the Oracle CX Cloud Mobile Profile Options: Explained topic.

Additional Information

More information about using, administering, and configuring CX Cloud Mobile, see the Sales guides in the Oracle Help Center.

Implementing Oracle CX Cloud Mobile: Overview

Here is a summary of the steps required to roll out Oracle CX Cloud Mobile (CX Mobile) at your organization:

1. If you are modifying CX Mobile for your organization’s particular requirements, you need to set the ZMS_DISABLE_OSCM profile option to **ENABLED**. Setting the profile option will enable the new mobile interface designer in Application Composer. For more details about navigating to profile options, see the topic that explains how to access predefined profile options.

2. To modify CX Mobile using the new mobile interface designer first enable a sandbox, then navigate to Application Composer, select the Sales application, and click **Mobile Application Setup**. Using the mobile interface designer you can configure the application pages, such as moving objects and fields that you want to make visible onto the on-screen smartphone, create your own page layouts, and define which roles can view your page layouts. For more details about modifying CX Mobile, see the topic called Modifying Oracle CX Cloud Mobile: Explained.

3. You can add Oracle Business Intelligence reports to CX Mobile, so that your sales team can view the reports directly in the application. See the topic called Adding Oracle Business Intelligence Reports to a Sales Object’s Analytics Sub Tab: Procedure for more details.

4. You can enable Oracle Social Network (OSN) so that your users can share Oracle Sales Cloud object records to OSN. See the topic called How can I set up Oracle Social Network for Oracle CX Cloud Mobile for more details.

5. You can also enable the voice feature by setting the ZMS_MOBILE_VOICE Profile Option value to **ENABLED**.

6. It’s recommended that you create a URL that automatically populates the host, port number, and SSO and SSL settings for your users. When users access the URL, CX Mobile will open with the applicable settings already populated. For details about how to create the URL, see the topic called How can I automatically populate the host, port number, and SSO and SSL setting for Oracle CX Cloud Mobile users?

7. Distribute the installation instructions and the URL you created in step 5 to your users. You can use the installation instructions outlined in the following topics: Installing the Oracle CX Cloud Mobile iPhone Application: Procedure and Installing the Oracle CX Cloud Android Application: Procedure.

Related Topics

- How can I access predefined profile options?
What are the supported platforms for Oracle CX Cloud Mobile?

See the System Requirements for Oracle Applications Cloud at: http://www.oracle.com/us/products/system-requirements/overview/index.html

Finding Your Company's Host URL: Worked Example

This topic shows how to determine the host URL value for iPhone and Android devices. When signing in to the Oracle CX Cloud Mobile (CX Cloud Mobile) application, users must enter a Host URL that specifies the Oracle Sales Cloud server location. The URL can be entered manually by the user, or you can create a URL that will automatically populate the host name, port number, and enable SSL (refer to the How can I automatically populate the host and port information for CX Cloud Mobile users topic for more details).

Determining the Host URL for iPhone and Android Devices

1. Sign in to Oracle Sales Cloud and select Navigator and then Application Composer.
2. Copy the host name portion of the URL that’s in your browser’s address bar. The host name is the part between https:// and the next slash (/). For example, the host URL might be something like: fapxxxx-crm.oracleads.com.
3. If users are entering the Host URL manually, then inform your users of the Host URL value so that they can use it when they sign into the application.

How can I automatically populate the host, port number, SSO and SSL setting for users?

Create a URL to distribute to your users, as follows:

1. To automatically populate the host URL, create the following URL: oscm://?host=<host value>. For example, oscm://?host=uscdrmovm44-crm-ext.us.oracle.com
2. To automatically populate the host URL and SSO setting, create the following URL: oscm://?host=<host value>&useSSO=<true/false>. For example, oscm://?host=uscdrmovm44-crm-ext.us.oracle.com&useSSO=true
3. To automatically populate the host URL, port number, and SSL setting in the Advanced Settings, create the following URL: oscm://?host=<host value>&port=<port value>&useSSL=<true/false>. For example: oscm://?host=uscdrmovm44-crm-ext.us.oracle.com&port=10616&useSSL=true

Distribute the formatted URL to your users, using e-mail or some other suitable communication method. When users access the URL, Oracle CX Cloud Mobile will open with the applicable settings already populated.

Note: Refer to the topic called Finding Your Company's Host URL: Worked Example to find the host name.

Installing the iPhone Application: Procedure

This procedure shows you how to install the Oracle CX Cloud Mobile application on your iPhone.

1. Open the App Store, search for Oracle CX Cloud Mobile application, and then tap Install.
2. Open the application. If you have received an application URL from your administrator, you can tap on the URL link to open the application. Alternatively you can scan the QR code to launch the application.

3. Accept the Legal Terms.

4. If you have opened the application using the application URL or the QR code, the host name, port number, and SSL details will be populated automatically.

   If you opened the application after downloading it from the App Store, you will need to enter the host name your administrator has provided (or refer to the Finding Your Company’s Host URL: Worked Example topic).

5. Enter your Oracle Sales Cloud user name and password. You can tap Save Password to save this password.

6. Tap Sign In.

Installing the Android Application: Procedure

This procedure shows you how to install the Oracle CX Cloud Mobile application on your Android device.

1. Open Google Play on your Android device.

2. Search for the Oracle CX Cloud Mobile application and tap Install.

3. Open the application. If you have got the application URL from your administrator, you can tap on the URL link to open the application. Alternatively you can scan the QR code to launch the application.

4. Accept the Legal Terms.

5. If you have launched the application using the application URL, or the QR code, the host name will be populated automatically.

   If you have opened the application after downloading it from Google Play you will need to enter the host name provided by your administrator (or refer to the Finding Your Company’s Host URL: Worked Example topic). Tap Settings to enter the host name.

6. Enter your Oracle Sales Cloud user name and password. You can tap Save Password to save this password.

Data Encryption: Explained

Data is encrypted using platform encryption, including offline data. Data visibility and functional security are the same as Oracle Sales Cloud.

How can I set up Oracle Social Network for Oracle CX Cloud Mobile?

You need to enable Oracle Sales Cloud objects - or certain attributes of the objects - for Oracle Social Network (OSN), so that the user can share Oracle Sales Cloud object records to OSN. If an object is enabled for OSN, then your users will see the social tab for the object within Oracle CX Cloud Mobile, which will enable them to share the object to OSN.

For details about enabling Oracle Sales Cloud objects for OSN, and for information about selecting whether the object is manually or automatically shared, see the Setting Up Oracle Social Network chapter in the Getting Started with Your Oracle Sales Cloud Implementation guide.
Setting up the Maps Feature: Procedure

There are certain scheduled processes that need to be run to enable the maps feature in the application. This procedure shows you which processes you need to run and the order you need to run them in.

1. Sign in to Oracle Sales Cloud as a user with an Application Implementation Consultant role.
2. Enable geocoding for a country by following the steps in the setting up geocoding topic, found in the Geographies for HCM chapter in the Implementing Global Human Resources guide.
3. Next, navigate to the Scheduled Processes work area and click **Schedule New Process**.
4. Click the Name drop-down and search for Populate Lead Latitude and Longitude Information, and then click OK.
5. Enter the parameters, such as Start Date and End Date, and schedule the job to run automatically at specified intervals.
6. Click **Submit**.
7. Carry out steps 3 to 5 again, this time searching for the Populate Location Latitude and Longitude Information process.

**Related Topics**

- Setting Up Geocoding: Procedure

Adding Oracle Business Intelligence Reports to a Sales Object's Analytics Tab: Procedure

To view Oracle Business Intelligence Analysis (BI) reports in a Sales object's Analytics tab (for example, an Accounts or Contacts Analytics tab), you must first perform some configuration tasks from the web application.

1. Sign in to Oracle Sales Cloud as a user that has a Sales Cloud Administrator job role and create, or activate, a sandbox. See the topic about using sandboxes for more information about creating, activating, and publishing sandboxes.
2. Navigate to Application Composer and select the **Sales** application.
3. Select **Mobile Application Setup** under the Common Setup list.
4. In the Application Features pane, click the sales object that you want to add the report to.

**Note:** You can add reports to the following Sales objects only: Account, Opportunity, Contact, Lead, Partner, and Deal Registration.

5. Click **Analytics**.
6. In the Available Reports section, search for the report you want to add to the Sales object's Analytics tab.

**Note:** You can view all of your BI reports that you have available in your catalog.

7. Drag and drop the report onto the mobile interface designer.
8. Click on the report on the mobile interface designer to see the Report Information, Report Filters, and the Assigned roles sections.
9. In the Report Filters section you can see the filters that have been created for the BI report. To further filter the report, or to enable contextual reporting, click the report in the mobile interface designer, and enter the parameters you want the mobile report to use in the Report Filters section. The parameter values are the attribute names which are available in Application Composer under the standard and custom fields list.
You can override a BI report parameter value so that only the data relevant to the Sales object you are viewing is displayed. Any attributes (apart from ID and Name) can be used as filters by passing the appropriate parameters. For example, for an Account report you could filter using the @PartyId or @PartyUniqueName parameters to see report information relevant to the Account you are viewing.

Note: You can only provide parameter values to filters that have already been defined in the original BI report.

10. Click the filter’s check box to make the filter active.
11. In the Assigned Roles section, select the roles that will be able to view the report. If you don’t assign a role then the report will be available to all job roles.
12. Click Save.
13. Check that your changes appear in the mobile application. See the Testing Oracle CX Cloud Mobile Customizations: Worked Example topic for details about how to check your mobile customizations.
14. When you are happy with your changes, publish your sandbox to distribute your customizations to all CX Cloud Mobile users. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud - Customizing Sales guide.

Related Topics
- Using Sandboxes: Explained

Creating Saved Searches: Procedure

This procedure shows you how to create a saved search that you can configure for use in the Oracle CX Cloud application. Use the mobile interface designer within Application Composer to create your mobile specific saved searches.

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your customizations.
3. Open Application Composer by selecting Application Composer under the Tools category in the Navigator menu.
4. Select the Sales application.
5. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
6. In the Application Feature pane, click the feature that you want to create a duplicate Saved Search for.
7. Click Saved Search and click the duplicate icon.
8. Enter a name for the new Saved Search and click OK.
9. Add fields to the saved search by dragging and dropping fields from the Available Fields pane onto the mobile interface designer.
10. Add criteria to a field by clicking on the field in the mobile interface designer and enter criteria in the Criteria pane. For example, you can add criteria to a Booking Date field that the date is greater than a set date.
11. If required, you can assign roles to the saved search by selecting roles in the Assigned Roles pane.
12. You can assign default roles to the saved search by selecting roles in the Assigned Default Roles pane.
13. Click Save.

Configuring the Offline Settings: Explained

Using Application Composer you can configure Oracle CX Enterprise Mobile’s offline settings, such as whether the offline data synchronization is automatic or manual. You can also select which top level sales objects are included in the auto synchronization.
Navigate to the Mobile Application Setup page in Application Composer to configure the following offline options:

- **Enable Offline Mode**: Enables or disables the offline mode.
- **Enable Offline Create and Edit**: Enables or disables the creating and editing of data offline.
- **Auto Sync**: Determines if the application automatically synchronizes offline updates from Enterprise Mobile to Oracle Sales Cloud when a network connection is detected.
- **Manual Sync**: Determines if the manual synchronization synchronizes updates from Enterprise Mobile to Oracle Sales Cloud and then vice versa (2-Way), or just from Enterprise Mobile to Oracle Sales Cloud (1-Way).
- **Max Number of Retries**: Determines the maximum number of times Enterprise Mobile will try to apply offline updates to Oracle Sales Cloud.
- **Online Data Fetch Policy**: Defines how the application uses the local data on the phone and the server data when there is network connection. The option called **Local** enables the application to only display data that are stored on the phone. The option called **Remote** enables the application to only display the data that are on the server. The option called **Both** enables the application to display the local data primarily and then query the server in the background for remote data that have changed. The changed data are then displayed rather than the local data.
- **Auto Clear Cache**: Defines the maximum duration that data is stored on the user’s phone, after which the data will be removed from the phone.

To select which top level sales objects, including custom objects, are included in the auto synchronization, navigate to the Mobile Application Setup page in Application Composer. In the navigation panel, select the sales object, then click **Settings**, and enable the Auto Fetch option.

### Oracle CX Cloud Mobile Profile Options: Explained

The following table lists the Profile Options that you can use to configure Oracle CX Cloud Mobile:

<table>
<thead>
<tr>
<th>Profile Option Name</th>
<th>Profile Option Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZMS_DISABLE_OSCM</td>
<td>Specify whether you want to customize Oracle CX Enterprise Mobile in Application Composer (by selecting ENABLED), or customize Oracle Sales Cloud Mobile (by selecting DISABLED).</td>
</tr>
<tr>
<td>ZMS_DISABLE_EMA_CLIENT_ACCESS</td>
<td>Specify whether Oracle CX Cloud Mobile has access to Oracle Sales Cloud data.</td>
</tr>
<tr>
<td>ZMS_MOBILE_VOICE</td>
<td>Enable or disable the mobile voice feature.</td>
</tr>
<tr>
<td>ZMS_LOG_CALLS</td>
<td>Specify whether calls and emails from Oracle Sales Cloud Mobile are logged automatically, or require user confirmation before they are logged.</td>
</tr>
<tr>
<td>ZMS_MOBILECALENDAR_SYNC</td>
<td>Enable synchronization of the calendar with smartphone calendar applications.</td>
</tr>
<tr>
<td>ZMS_MOBILECONTACTS_SYNC</td>
<td>Enable synchronization of contacts with smartphone contact applications.</td>
</tr>
<tr>
<td>ZMS_SAVELOGIN_PASSWORD</td>
<td>Enable saving of the login password on the mobile device for a more automated sign in.</td>
</tr>
</tbody>
</table>
How can I disable access to sales cloud data from the Oracle CX Cloud Mobile application?

Open the `ZMS_DISABLE_EMA_CLIENT_ACCESS` Profile Option and set the value to `DISABLED` to disable access to Oracle Sales Cloud data from Oracle CX Cloud Mobile.

How can I enable the voice feature?

Open the `ZMS_MOBILE_VOICE` Profile Option and set the value to `ENABLED`.

Configuring Oracle CX Cloud Mobile: Explained

You can configure the Oracle CX Cloud Mobile iPhone and Android applications using Application Composer. Using Application Composer, you can manage which objects and fields are visible on the Oracle CX Cloud Mobile application without having to carry out specific configurations for a particular device.

Creating a Page Layout for a Feature

You can create a List, Detail, or Edit page layout for a Oracle CX Cloud Mobile feature. Creating your own layout enables you to select the fields your users will see for a feature’s views. See the Creating a Page Layout for a Feature: Procedure topic for details about how to create a page layout.

When you create a page layout, you can add, remove, move, and change a field’s display format using the mobile interface designer. Find out more information about using the mobile interface designer in the following FAQs:

- How can I add a field to a feature’s page layout?
- How can I delete a field in a feature’s page layout?
- How can I move a field in a feature’s page layout?
- How can I edit a field’s display format in a feature’s page layout?
- How can I hide or display user actions for a feature?

Adding a Role to a Page Layout

You can add a role to an application feature’s List, Detail or Edit layout. For example, a user with the Sales Manager role might want to see certain fields on an opportunity detail record that other sales team members won’t need. See the Adding a Role to a Layout: Worked Example topic for details about adding a role.

Creating Criteria for a Page Layout

You can create criteria to define a set of conditions that have to be met before the page layout is displayed for a feature’s Detail or Edit views. See the Creating Criteria for a Feature Page Layout: Procedure for step by step instructions.

Adding Your Own Object to a Page Layout

You can add your own objects to your CX Cloud Mobile application, and add page layouts in the same way that you can with standard sales objects (or features, as they are known as in the Mobile Application Setup). See the Adding Your Own Object to a Page Layout: Procedure topic for more details.
Assigning Geographical Regions to a Page Layout

You can assign geographical regions to a page layout, which will restrict a page layout’s availability to users from your selected set of geographical regions.

Testing Configurations

After you have configured Oracle CX Cloud Mobile using Application Composer, you should test your configurations before distributing them to your user’s mobile devices. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for more details.

Creating a Page Layout for a Feature: Procedure

This procedure shows you how to create a List, Detail, or Edit page layout for an Oracle CX Cloud Mobile (CX Cloud Mobile) feature. Creating your own layout enables you to select the fields your users will see for a feature’s views in CX Cloud Mobile.

⚠️ Tip: You can also specify which user roles can view a particular layout, and you can create criteria that have to be met to display the layout. See the Adding a Role to a Layout: Worked Example topic for more details about adding user roles. See the Creating Criteria for a Feature Page Layout: Procedure topic for more information about adding advanced criteria.

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your customizations.
3. Open Application Composer by selecting Application Composer under the Tools category in the Navigator menu.
4. Select the Sales application.
5. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
6. In the Application Feature pane, expand the subheader of the feature that you want to create a layout for.
7. Click the Duplicate icon for the Standard layout and enter a layout name.
8. Click OK.
9. Select the Active tick icon if it’s not already ticked.
10. Add fields to the layout by selecting the field in the Available Fields pane, and then drag and drop the field onto the mobile interface designer. See the topic called How can I edit a field’s display format in a feature’s page layout for information about defining a display format for your fields.
11. You can remove fields by clicking the field you want to delete on the mobile interface designer and then clicking the cross icon.
12. You can move fields by clicking the field and dragging it to your preferred location.
13. Click Save in the top right hand side of the Application Composer page.
14. Test and publish your new page layouts. See the Testing Oracle CX Cloud Mobile Customizations: Worked Example topic for details about how to check your mobile customizations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud - Customizing Sales guide.

How can I add a field to a feature’s page layout?

Navigate to the mobile interface designer in Application Composer, select the field in the Available Fields pane, and then drag and drop the field onto the mobile interface designer. Click Save in the top right hand side of the Application Composer page. See the Creating a Page Layout for a Feature: Procedure topic for more information about creating a page layout.
How can I delete a field in a feature's page layout?

Navigate to the mobile interface designer in Application Composer, select the field you want to delete, and then click the cross icon. Click **Save** in the top right hand side of the Application Composer page. See the Creating a Page Layout for a Feature: Procedure topic for more information about creating a page layout.

How can I move a field in a feature's page layout?

Navigate to the mobile interface designer in Application Composer, select the field you want to move, and then click the field and drag it to your preferred location. Click **Save** in the top right hand side of the Application Composer page. See the Creating a Page Layout for a Feature: Procedure topic for more information about creating a page layout.

How can I edit a field's display format in a feature's page layout?

Navigate to the mobile interface designer in Application Composer, select the field you want to edit, and click the **Edit** pencil icon. Select the display format you want and click **Save** in the top right hand side of the Application Composer page. See the Creating a Page Layout for a Feature: Procedure topic for more information about creating a page layout.

_closed_text:{
  Restriction: Not all fields can be edited. You can only edit fields that require you to choose a display format.
}

How can I hide or display user actions for a feature?

Navigate to the mobile interface designer in Application Composer, select the feature, then select either the **List** or **Detail** page. Select or create a page layout, tap the action button on the mobile interface designer, and select which actions you want to display or hide using the toggle buttons. Click **Save** in the top right hand side of the Application Composer page. See the Creating a Page Layout for a Feature: Procedure topic for more information about creating a page layout.

Adding a Role to a Layout: Worked Example

This example describes how to add a role to an Oracle CX Cloud Mobile (CX Cloud Mobile) page layout. You can add a role to an application feature's List, Detail or Edit layout. For example, a user with the Sales Manager role might want to see certain fields on an opportunity detail record that other sales team members won’t need.

_closed_text:{
  Note: You can’t add a role to a custom feature. Custom features are created when you create a custom object in Application Composer, and they’re selected from the Available Features pane.
}

In this example, you add a role to an Opportunity Detail layout and display the new layout in the CX Cloud Mobile application.

Add a Role to a Layout

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your customizations.
3. Open Application Composer by selecting **Application Composer** under the Tools category in the Navigator menu.
4. Select the **Sales** application.
5. Under the Common Setup Menu, or on the Overview page, click **Mobile Application Setup**.
6. In the Application Feature pane, expand the subheader of the application feature that you want to add the report to. In this example, expand the Opportunities subheader.
7. Expand the subheader of the layout you want to add the role to. In this example, expand the Detail subheader.
8. Select the layout you want to add a role to. In the Assigned Roles pane, select the roles you want to add and click **Save**.

**Test and Publish Your Changes**

1. Check that your changes appear in the mobile application. See the Testing Oracle CX Cloud Mobile Customizations: Worked Example topic for details about how to check your mobile customizations.
2. When you are happy with your changes, publish your sandbox to distribute your customizations to all CX Cloud Mobile users. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud - Customizing Sales guide.

**Related Topics**
- Using Sandboxes: Explained

**Creating Criteria for a Feature Page Layout: Procedure**

This procedure shows you how to create criteria for an Oracle CX Cloud Mobile feature’s page layout. Creating criteria enables you to define a set of conditions that have to be met before the page layout is displayed for a feature’s Detail or Edit views. For example, if you create criteria for an Opportunity Detail layout as follows: **Win probability is Greater than 50%**, then any opportunities with a win probability greater than 50% will use your layout in the Detail view.

> **Note:** You can’t create criteria for a feature’s List view.

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your customizations.
3. Open Application Composer by selecting Application Composer under the Tools category in the Navigator menu.
4. Select the Sales application.
5. Under the Common Setup Menu, or on the Overview page, click **Mobile Application Setup**.
6. In the Application Feature pane, expand the subheader of the relevant feature.
7. Expand the subheader of the relevant page view and select the page layout you want to add criteria to.
8. In the Advance Criteria pane, click **Add**.
9. Create your criterion by selecting a field, operator, and then entering the relevant field value.

> **Note:** You can’t select a field value from a list of values (LOV), so you will need to type in the value if you would normally select it from an LOV.

10. To add a conditional statement click **Add** and select **AND** or **OR**. Enter the field, operator, and relevant field value.
11. When you have finished creating your criteria for the page layout, click **Save** in the top right-hand side of the Application Composer page.
12. Test and publish your new page layout criteria. See the Testing Oracle CX Cloud Mobile Customizations: Worked Example topic for details about how to check your mobile customizations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud - Customizing Sales guide.
Adding a Custom Object to a Page Layout: Procedure

This procedure shows you how to add a custom object to your Oracle Sales Cloud Cloud Mobile (CX Cloud Mobile) application. Sales objects are also known as features in CX Cloud Mobile, and when you create a custom Sales object in Application Composer a corresponding feature is also created in CX Cloud Mobile. These features can be found in the Available Features pane in the Mobile Application Setup page.

Here are the steps to add a custom object, or feature, to CX Cloud Mobile:

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementor role.
2. Select the sandbox you want use for your customizations.
3. Open Application Composer by selecting Application Composer under the Tools category in the Navigator menu.
4. Select the Sales application.
5. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
6. In the Available Feature pane, click on the feature you want to add, and drag and drop it onto the mobile interface designer.
7. Click OK in the information message about the views that will be created.
8. If you want to add custom layouts to the List, Edit, or Detail views, see the Creating a Page Layout for a Feature: Procedure topic for more details.
9. If you want to add fields to the picker, click on the fields you want to add in the Available Fields pane, and drag and drop them onto the mobile interface designer.
10. When you have finished adding features, click Save in the top right-hand side of the Application Composer page.
11. Test and publish your new features. See the Testing Oracle CX Cloud Mobile Customizations: Worked Example topic for details about how to check your mobile customizations. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud - Customizing Sales guide.

How can I hide or display a feature in the navigator menu?

Navigate to the mobile interface designer in Application Composer. In the mobile interface designer, click on the feature you want to hide or display in the navigator menu and use the Show on Navigator switch in the Feature Details pane to hide or display the feature. Click Save.

Renaming Fields in the Application: Explained

To update field names in Oracle CX Cloud Mobile, you need to update the field’s display label in Application Composer, and then the field name is automatically updated in Oracle CX Cloud Mobile. See the ‘Adding Objects and Fields in Application Composer’ chapter in the Customizing Sales guide for more information about updating field names in Application Composer.

Configuring an Application Feature’s Related Objects: Procedure

An application feature (such as opportunities and contacts) can have related objects, or items, (such as attachments and Business Intelligence reports) that are displayed as tabs at the bottom of the detail page view. This procedure shows you how to add, remove, and reorder related objects in the detail page view. You will also find out how to specify roles, geographical regions, and criteria conditions to control who can view the related objects.
Adding, Removing, and Reordering Related Objects

You can add, remove, and reorder the related objects that appear in an application feature’s detail page view.

1. Create a new detail page layout for an application feature. For information about how to create a new page layout, refer to the Creating a Page Layout for a Feature: Procedure topic.
2. In the mobile interface designer, click the Related Item button and a list of the related objects is displayed.
3. To add a related object to the detail page, drag a related object from the Related Items pane onto the mobile interface designer.
4. To remove a related object, click the related object in the mobile interface designer and click the cross icon. The related object moves to the Related Items pane.
5. To reorder the related objects, click the related object you want to move and drag it up or down to the appropriate position.

Specifying Roles, Regions, and Criteria for Related Objects

You can create a set of related objects for a particular role or geographical region, or even for a specified set of criteria. For example, you can create a Business Intelligence reports tab in an opportunity’s detail page that only sales managers can view.

Tip: You can specify roles, regions, and criteria for any type of page layout in the application, not just for related objects.

1. Follow steps 1 to 5 in the Adding, Removing, and Reordering Related Objects section of this topic to specify the related objects you want to appear.
2. To assign a role for the related objects and page layout, expand the Assigned Roles pane and click the role (or roles) to select them.
3. To specify a set of related objects for a geographical region, expand the Assigned Regions pane and click the region (or regions) to select them.
4. To specify a set of criteria conditions that restrict when the related objects are displayed, follow these steps:

   a. Expand the Advanced Criteria pane and click Add.
   b. Create your criterion by selecting a field, operator, and then entering the relevant field value.
   c. To add a conditional statement click Add and select AND or OR. Enter the field, operator, and relevant field value.

Note: You can’t select a field value from a list of values, so you will need to type in the value if you would normally select it from the list.

Test and Publish Your Changes

Check that your changes appear in the mobile application. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for details about how to check your mobile configurations.

When you are happy with your changes, publish your sandbox to distribute your configurations to all CX Cloud Mobile users. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud - Customizing Sales guide.
Configuring the Call Report Pages: Explained

You can customize the Call Report pages within Oracle CX Cloud Mobile using Application Composer. Using the mobile interface designer within Application Composer, you can manage the fields on the Call Report detail and edit pages. You can add, remove, and move fields, and edit a field’s display format.

Here’s how to navigate to the Call Report feature, so that you can configure it using the mobile interface designer:

1. Sign in to the Oracle Sales Cloud application as a user with a Sales Administrator or Sales Implementer role
2. Select the sandbox you want use for your customizations.
3. Open Application Composer by selecting Application Composer under the Tools category in the Navigator menu.
4. Select the Sales application.
5. Under the Common Setup Menu, or on the Overview page, click Mobile Application Setup.
6. In the Application Feature pane, click the Call Report application feature.
7. Configure the feature using the steps outlined in the Customizing Oracle CX Enterprise Mobile: Explained topic and in the page layout FAQs.

Testing Oracle CX Cloud Mobile Customizations: Worked Example

After you’ve customized Oracle CX Cloud Mobile(CX Cloud Mobile) using Application Composer, you should test your customizations before distributing them to your user’s mobile devices.

Task Summary

To test your customizations, complete the following tasks:

1. Download the customizations from the sandbox and verify them.
2. Publish the sandbox

Customize CX Cloud Mobile Using Application Composer

1. Sign in to the Oracle Sales Cloud application as user with a Sales Administrator or Sales Implementer role.
2. Select the sandbox you want use for your customizations.
3. Navigate to Application Composer and select the Sales Application.
4. Under the Common Setup menu, select Mobile Application Setup and make your customizations. See the Customizing Oracle CX Cloud Mobile: Worked Example topic for more information about customizing CX Cloud Mobile

Download Customizations From the Sandbox

1. After making your customizations, keep the Oracle Sales Cloud web application open (signed in with a Sales Administrator or Sales Implementer role). Make sure that the sandbox where you made the changes is active in the application.
2. Open CX Cloud Mobile on your mobile device and sign in as a user that will be able to view your customizations. For example, if the changes have been made to a layout with an assigned role, then you’ll need to sign in with a user that has the required role permissions to see the changes.
3. Tap the menu button (on the top left hand side of the page) and tap Sandbox to download the customizations from the sandbox.
4. Select the sandbox that contains your customizations and tap Save.
5. Check your customizations. When you’re happy with your customizations you need to publish the sandbox.
Publish the Sandbox

1. Sign in to the Oracle Sales Cloud web application as the same user you used to make the customizations.
2. Publish your sandbox to distribute your customizations to all CX Cloud Mobile users. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud - Customizing Sales guide.

Mobile Sales

Mobile Sales: Overview

Use the Oracle Sales Cloud Mobile application to do the following tasks:

- Track and update sales information on your smartphone or tablet
- Keep up to date with sales activities in your enterprise while on the move

Tasks That You Can Do

The key features of Oracle Sales Cloud Mobile include the following:

- Application Home Page: From the application home page, you can access critical information when you're in the field.
- Sales Account Management: You can access reference information, as well as current events about the customer while on the road.
- Opportunity Management: From the mobile opportunity management page, you can access current and critical information about your opportunities and share opportunity updates with your sales team.
- Lead Management: With access to open leads while on the road, you can act upon leads and reduce the sales cycle time.
- Calendar and Tasks: With these features, you can manage appointments and tasks on the road.
- Contacts: You can call or e-mail contacts from the Actions menu. The application displays a list of your key contacts by default, and you can search for all other contacts. E-mail Contact and Call Contact features are disabled for contacts who don’t want to be phoned or e-mailed.
- Sales Analytics: You can access business intelligence reports from the home page. Analytics also are embedded contextually for each account that you view. The contextual reports include data on sales account revenue trends, sales account win/loss trends, and sales account win/loss reasons.
- Alerts: You receive alerts when new leads are assigned or opportunities of interest become available.

Prerequisites

Before implementing Sales Cloud Mobile, you must:

- You must set up Oracle Sales Cloud before you can use Sales Mobile.
- Determine if your mobile device meets Sales Mobile system requirements. See the System Requirements for Oracle Applications Cloud here: http://www.oracle.com/us/products/system-requirements/overview/index.html

Related Topics

- How can I navigate within the Oracle Sales Cloud Mobile client?
Implementing Mobile Sales: Explained

You must implement Oracle Sales Cloud prior to implementing Oracle Sales Cloud Mobile Sales. For more information, see the guide, Oracle Sales Cloud - Getting Started with Your Implementation.

Implementation Overview

Implementing Mobile Sales involves setting profile options and, optionally, customizing the fields and objects that users can view on their mobile devices.

You must set the following profile options:

- Password Save on Phone Enabled: Specifies whether users are allowed to store their login passwords on their mobile devices. Set to Y to allow saving, or N to not allowing saving. Allowing users to save passwords makes it easy for users to sign in to the mobile application without the need to enter a password each time they access the application.
- Password Save on Phone Enabled: Specifies whether users are allowed to store their login passwords on their mobile devices. Set to Y to allow saving, or N to not allowing saving. Allowing users to save passwords makes it easy for users to sign in to the mobile application without the need to enter a password each time they access the application.

Note: You can get supplementary information on implementing Mobile Sales in the Rollout Kit for Oracle Sales Cloud Mobile, available as Doc ID 1540393.1 on My Oracle Support (support.oracle.com).

Setting Profile Options

Follow this procedure to view and modify the mobile application profile options.

Set the following profile options:

1. Sign in as the sales administrator or as a setup user and navigate to the Setup and Maintenance work area.
2. Search for and select the Manage Administrator Profile Values task.
3. In the Profile Options search, select Oracle Sales Cloud Mobile as the application
4. Select the profile option that you want to change.
5. Set the profile as you want.

Customizing Mobile Sales

Mobile Sales is integrated with the same tool used for customizing the Sales Cloud applications, Oracle Application Composer. A five-step process guides you through the process of configuring specific fields and objects that users can manage on their mobile devices. To customize Mobile Sales, sign in to Application Composer and configure Mobile Sales pages.

Related Topics

- Oracle Sales Cloud - Getting Started with Your Implementation
How can I automatically populate the host information for Mobile Sales users?

You can create a URL that will automatically populate the host name, port number, and enable SSL, by using the following URL template: `osc://?host=[host name]&port=[port number]&useSSL=[true or false]`. After `host=` enter the host name, after `port=` enter the port number, and after `SSL=` enter whether you want SSL enabled. Here is an example of a URL: `osc://?host=abc.us.oracle.com&port=123&useSSL=false`.

Distribute the URL to your users. When users access the URL from their smartphone, the Sales Cloud Mobile application will open with the host name, port number, and SSL already populated or enabled.

> **Note:** Oracle Sales Cloud Mobile needs to have been downloaded onto the smartphone for the URL to work.

What are the Mobile Sales supported platforms?


Finding the Host URL: Worked Example

This topic shows how to determine the host URL value for iPhone and Android devices. When signing in to Oracle Sales Cloud Mobile, you must enter a **Host** URL that specifies the Oracle Sales Cloud server location.

**Determining the Host URL for iPhone and Android Devices**

Perform these steps to determine the Host URL for iPhone and Android devices.

1. Sign in to Oracle Sales Cloud, and select **Navigator** and then **Application Composer**.
2. Copy the host name portion of the URL that's in your browser's address bar. The host name is the part between `https://` and the next slash (`/`). For example, the host URL might be something like: `fapxxxx-crm.oracleads.com`.
3. Inform your users of the Host URL value so that they can use it when they sign in to the application.

**Related Topics**

- Installing the Oracle Sales Cloud Mobile iPhone Application: Procedure
- Installing the Oracle Sales Cloud Mobile Android Application: Worked Example

How can I disable Calendar and Contacts synchronization?

Disable or enable the Calendar and Contacts synchronization buttons on the sign out page. Navigate to Setup and Maintenance and go to the Manage Administrator Profile Values task. Search for the **Enable Calendar Synchronization** and **Enable Contact Synchronization** profile options, and set the options to either **Y** (to enable synchronization) or **N** (to disable synchronization). The default profile option values are set to **Y**.
How can I change certain default filter criteria?

Navigate to the Application Composer, find the Sales object that you want to alter (for example, a Contact or Opportunity), and expand the view of the Sales object. Click on Pages and then the Mobile Pages tab. Edit the Sales object, and select the Configure Filter for List View option that you want to use.

How can I set up the automatic saving of passwords?

Search for the Manage Administrator Profile Values task in the Setup and Maintenance work area. Set the Password Save on Phone Enabled profile option to either Y (Yes) or N (no).

How can I enable selectable address fields?

Set up geography data and validation in the desktop application, and this will be reflected automatically in the Oracle Sales Cloud Mobile application. Adding geography validation enables users to select their address from selectable address fields, or notify users if required address fields are missing. To find out more about how to set up geography data and validation, refer to the geography reference data setup overview topic.

Related Topics
- Geography Reference Data Setup Overview

How can I set up automatic logging of e-mails and calls?

Carry out the following steps:

1. Navigate to the Setup and Maintenance work area.
2. Search for the Manage Administrator Profile Values task.
3. Click the task name link in the search results.
4. In the Profile Display Name field, enter Log Calls Automatically, then click Search.
5. In the Profile Values region, enter either AUTOMATIC (enables automatic call/e-mail logging) or CONFIRM (requires user confirmation before logging the call/e-mail).

Can I set a default saved search?

Yes. If a saved search has been set as the default for an Oracle Sales Cloud object in the main application, then this becomes the default list criteria for the sales object in Oracle Sales Cloud Mobile. For more information about creating saved searches using Page Composer, see the Creating a Saved Search for an Object topic.

Note that hidden saved searches won't appear in Oracle Sales Cloud Mobile.

Related Topics
- Creating a Saved Search for an Object
How can I enable address fields to be selected using lists of values?

Set up geography data and validation in the desktop application, and this will be reflected automatically in the Oracle Sales Cloud Mobile application. Adding geography validation enables users to select their address from selectable address fields, or notify users if required address fields are missing. To find out more about how to set up geography data and validation, refer to the geography reference data setup overview topic.

Related Topics
- Geography Reference Data Setup Overview

Hiding the Assets Tab in the Accounts, Contacts, and Households Mobile Pages: Worked Example

This example shows you how to hide the Assets tab for Accounts, Contacts, and Households in Oracle Sales Cloud Mobile.

Navigating to the Mobile Pages tab in Application Composer

1. Sign in to Oracle Sales Cloud as a user that has a Sales Cloud Administrator job role and create, or activate, a sandbox. See the topic about using sandboxes for more information about creating, activating, and publishing sandboxes.
2. Navigate to Application Composer and select the Common application.
3. Expand the Standard Object and expand the menu of either the Account, Contact, or Household object.
4. Select Pages and then select the Mobile Pages tab.

Hiding Assets for the Account, Contact, and Household Objects

1. Under the Detail Page Layouts menu in the Mobile Pages tab, click the relevant layout name, and click the Edit icon.
2. In the Related Objects section, select Assets from the Selected Related Objects, and click the arrow to move the Assets object to the Available Related Objects.
3. Click Save and Close.

Checking and Distributing your Customizations

1. After removing the Assets object from your Account, Contact, or Household mobile pages, check that your changes appear in the mobile application. See the Testing Oracle Sales Cloud Mobile Customizations Using a Sandbox: Worked Example topic for details about how to check your customizations in the mobile application.
2. When you are happy with your changes, publish your sandbox to distribute your customizations to all Oracle Sales Cloud Mobile users. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud - Customizing Sales guide.

Related Topics
- Using Sandboxes: Explained
Mobile Sales Extensibility: Explained

Application Composer lets implementors customize the Oracle Sales Cloud Mobile Sales iPhone, Android and BlackBerry applications. Using Application Composer, implementors can manage which objects and fields are visible on the Oracle Sales Cloud Mobile application without having to carry out specific customizations for a particular device.

Implementors can manage the following for the Oracle Sales Cloud Mobile application:

- Enable standard Oracle Sales Cloud Sales and Common objects that are not enabled by default for smartphones.
- Enable custom Sales and Common objects for smartphones.
- Change the fields (including custom fields) visible on Oracle Sales Cloud Mobile for mobile-enabled Sales and Common objects (standard or custom objects).
- Configure the Sales Cloud Mobile layout based on roles, record type, expression, or any combination thereof.
- Add Business Intelligence reports to the Sales Cloud Mobile application.

Related Topics
- Customizing Oracle Sales Cloud Mobile

Testing Mobile Sales Customizations: Worked Example

Test all of your customizations in a sandbox before publishing them to the main application. Sandboxes are standalone environments where you define and test customizations before deploying the customizations to the production application. Use Application Composer to customize Oracle Sales Cloud Mobile pages or objects in a sandbox environment, and then view your customizations on your mobile device prior to publishing the changes.

Opening a Sandbox

1. Sign in to Oracle Sales Cloud as a user who has a Sales Cloud Administrator job role.
2. In the global region, expand the Settings and Actions menu.
3. Select Manage Sandboxes, under the Administration subheading.
4. Select the sandbox in which you want to make your customizations.

Note: You might have to make a sandbox active or create a new sandbox.

Configuring Oracle Sales Cloud Mobile Using the Application Composer

1. Open the Application Composer by selecting Application Composer under the Tools category in the Navigator menu.
2. Select the application that you want to customize within Application Composer.
3. Select the parent object that you want to configure.
4. Select the Pages node in the navigation tree.
5. Select the Mobile Pages tab to see the mobile configuration options for the parent and its child objects.
6. Configure the mobile pages as you want.

Note: If you want to configure a layout for a specific role, record type, or expression, you must first duplicate an existing page, configure that page, then specify a role, record type or expression for that page layout.
7. Sign out of the Oracle Sales Cloud application.

Checking Your Customizations in the Oracle Sales Cloud Mobile Application

1. Sign in to Oracle Sales Cloud application as an Oracle Sales Cloud Mobile user who has a Sales Representative, Sales Manager, or Sales Vice President job role.
2. Select the sandbox that contains your customizations.
3. Keeping the Oracle Sales Cloud browser window open on your laptop or PC, open Oracle Sales Cloud Mobile on your mobile device and sign in using the same user you used to sign in to Oracle Sales Cloud.

   Note: Signing in to the Oracle Sales Cloud Mobile application as the same user in step 1 lets you view the sandbox you selected in step 2. If the Oracle Sales Cloud browser window is still open, only you can access the sandbox on the Oracle Sales Cloud Mobile application. All other users can only view the published version of the application.

4. Check the pages that you customized to ensure that they're working as expected.
5. Publish your sandbox to distribute your customizations to all Oracle Sales Cloud Mobile users. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud - Customizing Sales guide.

Related Topics
- Sandboxes: Explained
- Using Sandboxes: Explained
- Sandboxes: How They Work with Some Customizations and Features

Adding Branding to Mobile Sales: Worked Example

This example shows you how to add your company name, company logo, and select an application theme color for Oracle Sales Cloud Mobile.

Adding a Brand Name

1. Sign in to Oracle Sales Cloud as a user that has a Sales Cloud Administrator job role and create, or activate, a sandbox. See the topic about using sandboxes for more information about creating, activating, and publishing sandboxes.
2. Navigate to Application Composer and select the Sales application.
3. Select Mobile Application Setup, which you can find under the Common Setup menu.
4. Select Configure Application Branding, which you can find under the Branding heading.
5. Add your brand name in the Selected Brand Name field and click Save and Close.

Adding a Company Logo

1. Repeat steps 1 through 4 above.
2. Under the Select Brand Logo heading, select Browse and choose an image.
3. Click Save and Close.

Selecting an Application Theme Color

1. Repeat steps 1 through 4 of the Adding a Brand Name section above.
2. Select an application theme color from the color grid.
3. Click **Save and Close**.

**Checking and Distributing your Customizations**

1. After adding your company name, company logo, and/or selecting an application theme color, check that your changes appear in the mobile application. See the Testing Oracle Sales Cloud Mobile Customizations Using a Sandbox: Worked Example topic for details about how to check your customizations in the mobile application.

2. When you are happy with your changes, publish your sandbox to distribute your customizations to all Oracle Sales Cloud Mobile users. For more information about publishing sandboxes, see the Publishing Sandboxes chapter of the Oracle Sales Cloud - Customizing Sales guide.

**Related Topics**

- Using Sandboxes: Explained

**Adding a BI Report to Mobile Sales: Procedure**

To view Oracle Business Intelligence Analyses reports in Oracle Sales Cloud Mobile, you must first perform the following configuration tasks from the web application.

1. Navigate to the Application Composer and select the **Sales** application.

2. Select **Mobile Application Setup** under the Common Setup list.

3. In the Mobile Application Setup page, select **Manage Mobile Reports**.

4. Create the report, entering the Oracle Business Intelligence Analyses report details.

5. Add the report to the Mobile Reports Springboard page, or the Mobile Reports Sales Account page, by selecting either **Configure Mobile Reports: Springboard** or **Configure Mobile Reports: Sales Account**.

Note that you can add Oracle Business Intelligence Analyses reports, but you can’t add Oracle Business Intelligence Publisher reports.

**What happens if I customize a BI report for Mobile Sales?**

The customized version of the Oracle Business Intelligence report is displayed on users’ smartphones. Also, any filters that you created for the report reflect the changes you made to the report.

**Creating a Mobile Sales Account Contextual Report: Procedure**

This procedure shows you how to create an Analysis report that’s filtered by the Customer or Account ID when it is viewed from the Account or Opportunity detail pages.

The Analysis Report can be filtered on any report column that is mapped to the Customer or Account ID, for example Customer.Customer Row ID. You can use any Subject Area, and in our example we will use a report based in the Sales - CRM Customer Overview subject area being run from the Account detail page.

**Restriction:** At present it’s not possible to use other IDs, such as Opportunity ID. So if the report is run from the context of the Opportunity Detail page, it must be filtered by the Customer or Account ID. This means that opportunities must be linked to a customer or account in order for them to be displayed.

1. From the Home page, navigate to Reports and Analytics.
2. Click the **Browse Catalog** icon.
3. In the Oracle Business Intelligence Catalog page, click **New** and then **Analysis**.

**Restriction:** Analysis reports are the only reports supported for Sales Cloud Mobile.

4. Select a Subject Area. For our example we are using the Sales - CRM Customer Overview subject area.
5. Double click on the column names in the Subject Areas pane to add them to your report. In our example we select Name, Country Code, and Customer Row ID from the Customer folder.
6. In the Filters section, select the filter icon and add an **is prompted** filter on a field that contains the Account or Customer ID. In our example we select the Customer Row ID column.
7. Make a note of the column formula by editing the filter you have just added and selecting the **Edit Formula** icon. For our example, the value is Customer.Customer Row ID.
8. Save the report.
9. Once the report is saved, you also need to take a note of the full path name of the report. To find this go back to the Catalog and select the report’s properties. Copy the location address (in our example it’s /users/sales_admin) and the report name (in our example it’s Mobile_Report). Add a forward slash to the end of the location address and append the report name to the location address. In our example, the full path name is: users/sales_admin/Mobile_Report.
10. Navigate back to the web application and open an active sandbox.
11. Navigate to Application Composer and select the Sales application. Under the Common Setup menu item, select **Mobile Application Setup**.
12. Select **Manage Mobile Report**.
13. Create a new mobile report. In the Path field, enter the full path name of the report that you made a note of in step 9.
14. Enter the report parameters as follows:

<table>
<thead>
<tr>
<th>Report Parameters</th>
<th>Value</th>
<th>Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>SubjectName. table.Customer Row ID</td>
<td>This is the field that has been defined in the filter. For example, Sales - CRM Customer Overview. Customer. Customer Row ID</td>
</tr>
<tr>
<td>Value</td>
<td>#{viewScope.CustomerId}</td>
<td>This is used by Sales Mobile to pass the ID of the current customer being viewed on the account or opportunity detail page</td>
</tr>
<tr>
<td>Type</td>
<td>filter</td>
<td>Used to build filter query</td>
</tr>
<tr>
<td>Data Type</td>
<td>varchar</td>
<td>Used to build filter query</td>
</tr>
<tr>
<td>Operator</td>
<td>in</td>
<td>Used to build filter query</td>
</tr>
</tbody>
</table>

15. Click **Save and Close**.
16. Click the Standard Objects menu item and select an Account or Opportunity object. In our example we will select the Sales Accounts object.
17. Click **Pages** and then click **Mobile Pages**.
18. Click **Configure Mobile Reports:** (object name).
19. Move the newly added report from the Available Reports to the Selected Reports and save the changes.
20. Check the report in the Sales Cloud Mobile application.
21. Publish the sandbox when you’re satisfied with the report.
Related Topics

- Creating Analytics with Subject Areas

Dynamic Choice Lists in Mobile Sales: Explained

A dynamic choice list field provides a list of values from which your users can select a value at run time. The list of values is considered dynamic because the list is based on a query of a related object’s records. Some dynamic choice list fields are standard, which means they are provided automatically with Oracle Sales Cloud. You can also create custom dynamic choice list fields in Application Composer. Both standard and custom dynamic choice list fields can be displayed on Oracle Sales Cloud pages, as well as on Oracle Sales Cloud Mobile pages.

In this topic, we’ll review the following:

- What are dynamic choice list fields, and why are they useful?
- Adding dynamic choice list fields to Oracle Sales Cloud Mobile pages.
- Creating the related object subtabs in Oracle Sales Cloud Mobile.

What’s a Dynamic Choice List Field?

A dynamic choice list is a field that contains a list of values which are populated from the actual data of a related object. At run time, your users can select a value from the field. This selection associates that related object’s value with the primary object’s record that the users are currently looking at.

For example, let’s say your users need to specify an account for an agreement:

- Desired result:
  
  On the Create Agreement or Edit Agreement page, you want your users to select an account from the Account Name field.

- Steps to enable the desired result:

  To enable this behind the scenes, you’ll use Application Composer to create the Account Name dynamic choice list field on the Agreement object. The Account Name field will be populated with a list of account records from the Account object. Once that field exists on the Agreement object, you’ll add the field to all Agreement pages (including Mobile pages).

- End result:

  The Account Name field will now be available from the Create Agreement or Edit Agreement pages. The field itself will include a list of actual account names, populated from the Account object.

Why are Dynamic Choice List Fields Useful?

Dynamic choice list fields are useful because they display at run time with a prepopulated list of values, which your users can pick from. But, dynamic choice lists fields are also very useful because, behind the scenes, they enable a one-to-many relationship between the source object and target object.

This means that not only do you get the ability to associate a source object record (using our previous example, an account) to a target object record (an agreement) using the dynamic choice list field. But, you can also add a related object subtab to the source object’s details page (the Account details page), showing a list of all the target object records (agreements) that are associated with a single source object record (account).
In our previous example of making a list of accounts available for association with an agreement, the relationship that is created between the Account and Agreement objects is a one-to-many relationship, where one account can be associated with multiple agreements. Behind the scenes, an account identifier is stored in the Agreement object’s table.

Once the dynamic choice list field is created, the one-to-many relationship that is automatically created means that you can now use Application Composer to display an Agreements subtab on the Account details page. This subtab lists all the agreements that are related to an account. Having this ability to add subtabs is a nice benefit; in a single view, your end users can see all the agreements that are related to a single account. Creating subtabs based on an existing dynamic choice list field is discussed below.

Adding Dynamic Choice List Fields to Oracle Sales Cloud Mobile Pages

You can add standard and custom dynamic choice list fields to your Oracle Sales Cloud Mobile pages. Adding dynamic choice list fields to Mobile pages requires three steps:

1. Configure the Mobile picker page for the source object that populates the dynamic choice list field.
2. Create a dynamic choice list field based on that same object.
3. Add the field to your Mobile pages.

Let’s review each step in depth:

1. Configure the Mobile picker page, also known as a search and select page, for the source object that populates the dynamic choice list field. This is a required, one-time configuration task per object. If you don’t configure the picker page, then you won’t be able to display that object’s dynamic choice list fields on any Mobile UI. This configuration is required for both standard objects as well as custom objects.

   **Note:** Some exceptions exist.

   - For example, the Account object is delivered with the picker page already configured for your use, so you don’t have to configure a picker for the Account object.
   - Some other standard objects don’t support the Mobile picker page. In this case, if standard dynamic choice list fields exist based on those objects, then you won’t be able to add those fields to Mobile UIs.

   To configure the picker page for standard and custom objects (except Account):

   a. Navigate to Application Composer.
   b. Select the application where your object exists, either Sales or Common.
   c. Under the Objects navigation tree, expand the tree structure for your object.
   d. Click the Pages node.
   e. Click the Mobile Pages tab.
   f. In the Picker region, click the **Create Mobile Picker** link for your object.
   g. On the Configure Mobile Picker page, select the fields that you want to display in the picker page. For example, let’s say this is the picker page where your users will search for a contact. In addition to the contact name, you might also want to display the contact city in the picker page. At run time, your users will be able to decide between Mary Smith from New York, or Mary Smith from Los Angeles.
   h. Click **Save and Close**.

2. After the Mobile picker page is created for an object, you can now create any dynamic choice list field based on that same object. See: "Dynamic Choice Lists: Explained”.

3. Once your dynamic choice list field is created, you can now add the field to your Mobile pages. See: "Customizing Oracle Sales Cloud Mobile".
Tip: If your dynamic choice list field is not available to add to a Mobile UI, then confirm that the Mobile picker page was created for the dynamic choice list field's source object. See Step 1 above.

Note: Navigating to a sales object's details page after selecting the sales object from a DCL field is not supported currently.

Adding Subtabs to Oracle Sales Cloud Mobile Pages

After you create a one-to-many relationship between objects using a dynamic choice list field, you can then expose the "many" object's records on a subtab that is displayed on the "one" object's details page. You do this by creating a related object subtab in Application Composer.

Note: You can display a custom object subtab on a custom object Mobile details page. You can also display a custom object subtab on a standard object Mobile details page. Displaying a standard object subtab on a custom object Mobile details page, however, is not supported.

Adding a subtab to Mobile pages requires four steps:

1. Create and configure the Mobile relationships list for the related object.
2. Configure the picker page for the related object.
3. Indicate if you want your end users to be able to create new records and add existing records, directly from the subtab.
4. Finally, add the subtab to the Mobile details page layout or layouts where you want the subtab to appear.

Let's review each step in depth:

1. Create and configure the Mobile relationships list for the related object. This is where you create the table format that displays on the subtab.
   a. Navigate to Application Composer.
   b. Select the application where your object exists, either Sales or Common.
   c. Under the Objects navigation tree, expand the tree structure for your object.
   d. Click the Pages node.
   e. Click the Mobile Pages tab.
   f. In the Related Objects region, view the list of objects that are available to add as subtabs to your object’s details page.
      Click the Create Mobile Page link for your related object. The Create Mobile Page link is enabled if the related object’s top level Mobile pages are already created.
   g. On the Create or Edit List Layout page, use the List View region to indicate which related object fields you want to appear on the subtab.

2. Configure the picker page for the related object. If you enable your end users to add one or more existing records to the subtab at run time, then they will access this picker page.
   a. On the Create or Edit List Layout page, use the Picker: Select many region to indicate which related object fields you want to appear on the picker page for the related object.

3. Indicate if you want your end users to be able to create new records and add existing records, directly from the subtab.
   a. On the Create or Edit List Layout page, check Show Add and Show Create to enable those actions on the subtab.
4. Finally, add the subtab to the Mobile details page layout or layouts where you want the subtab to appear.
   a. Back on the Mobile Pages tab, navigate to the Detail Page Layouts region.
   b. Duplicate the standard layout to create a new layout to edit, or edit another existing layout.
   c. In the Related Objects region, view the list of related objects that are available to add as subtabs to your object’s details page. In the Available Related Objects list, your subtab displays using the one-to-many relationship name that was automatically created when you first created the dynamic choice list field. To display your subtab on the Mobile details page, move that subtab to the Selected Related Objects list.
   d. Click Save and Close.

Related Topics
- Customizing Oracle Sales Cloud Mobile
- Dynamic Choice Lists: Explained
- Object Relationships: Explained
- Configuring a Search and Select Dialog Box: Explained

Adding a BI Mobile Application Designer Report to Mobile Sales: Procedure

The following procedure outlines how to add an Oracle Business Intelligence Mobile Application Designer report to Oracle Sales Cloud Mobile.

1. Within Oracle Business Intelligence, click Catalog and then find the Mobile Application Designer Report that you want to add to Sales Cloud Mobile.
2. Open the report.
3. Click Share at the top right-hand side of the report page and you will see the URL of the report.
4. Make a note of the part of the URL after xma=. For example, from the URL https://testpod-test.bi.em2.oraclecloud.com:443/mobile/viewer.jsp?_xma=%2FCustom%2Fmobileapp2.xma, you would copy the following part of the URL: %2FCustom%2Fmobileapp2.xma
5. Navigate to Oracle Sales Cloud Application Composer.
6. Select the Sales application, and under the Common Setup menu click Mobile Application Setup.
7. Click Manage Mobile Report.
8. Click Create and enter a name and the display name for the report.
9. Enter the path name; this is the part of the URL you copied in step 4.
10. Select Mobile Application Designer Report. Save the report.
11. Click Mobile Application Setup again and click Configure Mobile Reports: Springboard.
12. Add the report that you created in steps 8 to 10.
13. Click Save and Close.
14. Sign in to Sales Cloud Mobile, tap the Analytics icon, and check that the report appears in the list.

More information about Oracle Business Intelligence Mobile Application Designer can be found in the related link below.

Related Topics
- Oracle Business Intelligence Mobile Application Designer
Can I delete Around Me custom fields?
Yes. If you created custom fields for the Around Me feature for earlier releases, you don’t have to maintain the fields with geocodes because the application no longer uses them.

Mobilytics

Mobilytics: Overview
Oracle Sales Cloud Mobilytics is an iPad application used to provide sales leaders intelligence into sales performance. Mobilytics enables you to better manage your pipeline and team, and helps you to:

- Shape your quarterly forecasts more intelligently
- Focus on key deals and accounts
- Collaborate with team members using Oracle Social Network and e-mail
- Manage your team’s interactions with opportunities to improve pipeline conversion rates
- Access your team’s performance to better manage their potential and productivity

Setting Up Mobilytics: Explained
This topic describes the prerequisites and procedure for installing Oracle Sales Cloud Mobilytics.

Prerequisites
To use Mobilytics, you must:

- Have Oracle Sales Cloud implemented.
- Have the appropriate role:
  - Users with the Sales Rep role can view their own data.
  - Users with the Sales VP or Sales Manager job role can utilize the full capabilities of Mobilytics
- Set up your sales organization and quota to use Team Tracker
  - Define and allocate your quota by quarter
- Enable the forecast criteria override rule if your company does not use the forecast module. Use the Select Forecasting Options task in Setup and Maintenance
- Have the Oracle Cloud Calendar set up (see related links for more details).

Installing Mobilytics
To install the app, follow this procedure:

1. Download Oracle Mobilytics from the Apple Store.
2. Install the app.
3. When prompted, enter your host name. To determine your host name:
   
   a. Sign in to Oracle Sales Cloud and go to the welcome page.
   b. Click the arrow next to your sign in name and select Applications Help.
   c. Copy the portion of the link up to helpPortal, for example
      : https://company-website.com/helpPortal/
   d. Add /mobilytics to the URL, for example
      : https://company-website.com/helpPortal/mobilytics

Related Topics
• About Setting Up the Accounting Calendar in Oracle Sales Cloud

Configuring Mobilytics: Explained

You can configure many of the Oracle Sales Cloud Mobilytics metrics using profile option values. Users with the Sales Administrator role should follow this procedure to configure profile option values:

1. From the Navigator, choose Setup and Maintenance.
2. Search for Manage Administrator Profile Values.
3. In the Module field, select Mobilytics.
4. Click Search
5. In the Search Results area, select the Profile Option you want to change.
6. Enter the desired value in the Profile Values area

The following table shows the available profile options and default values.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Fetch Year</td>
<td>Data pulled into the application is based on the Sales Cloud fiscal year. You can specify how many years worth of data to bring in.</td>
<td>2014</td>
</tr>
<tr>
<td>Deal Size</td>
<td>The default values are based on opportunity revenue amount.</td>
<td></td>
</tr>
<tr>
<td>Deal Radar Activity Level</td>
<td>Level and placement in the Deal Radar visualization is determined by the number of interactions in the last 30 days.</td>
<td></td>
</tr>
<tr>
<td>Deal Radar Time - Months</td>
<td>This alternative view filter displays three months of data.</td>
<td></td>
</tr>
</tbody>
</table>

- Between $0 and $500,000 = Small
- Between $500,001 and $999,999 = Medium
- Greater than 1 million = Large
- If the number of activities is less than 4 the level is considered Low
- Between 4 and 8 the level is Medium
- Greater than 8 then the level is considered High
- The inner circle displays the current month; the middle circle displays next month; the outer circle displays three months from the current date. You can override the number of months to display in each circle.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Tracker Nine Card Performance</td>
<td>Tenure and Attainment Percent can be overridden.</td>
<td>The X Axis is based on Tenure: (from left to right)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• First box = Less than a year</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Middle box = Between a year and two years</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Third box = More than 2 years</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Y Axis is based on Attainment: (bottom to top)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• First box = Less than 70% attainment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Middle box = Between 70% and 100% attainment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Third box = More than 100% attainment for the current fiscal years won opportunities</td>
</tr>
</tbody>
</table>
28 Setting Up Outlook

Overview of Oracle Sales Cloud for Outlook

The Oracle Sales Cloud for Outlook application helps maximize sales productivity by providing Oracle Sales Cloud capabilities directly within Microsoft Outlook, thereby allowing sales professionals access to essential Sales Cloud data.

Summary of Features

The following table lists the key features of Oracle Sales Cloud for Outlook.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Cloud capabilities within Microsoft Outlook</td>
<td>Using Oracle Sales Cloud for Outlook, all emails, calendar events, and tasks can be linked to the respective contact, customer, lead, or opportunity within Oracle Sales Cloud. Sales professionals can access and update customer and sales information within Microsoft Outlook.</td>
</tr>
<tr>
<td>Single-click sharing between Microsoft Outlook and Oracle Sales Cloud</td>
<td>When sending a meeting invite or an email, or when setting up a task, a single click on the Share with Oracle Sales Cloud button captures the action and updates of Oracle Sales Cloud in the background.</td>
</tr>
<tr>
<td>Synchronization of data between Oracle Sales Cloud and Microsoft Outlook</td>
<td>Two-way data synchronization allows sales professionals to have a continuously updated and accurate 360-degree view of Sales Cloud data changes.</td>
</tr>
<tr>
<td>Synchronization Control Panel</td>
<td>Oracle Sales Cloud for Outlook provides synchronization filtering capabilities, enabling sales professionals to synchronize only the most critical data from Oracle Sales Cloud. Sales professionals can synchronize high-priority accounts or opportunities closing this quarter, instead of synchronizing the entire data set from Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Offline access</td>
<td>The transition between online and offline modes of operation allows sales professionals in the field to use the full functionality of the product in an offline mode, and then synchronize the sales data in the next synchronization cycle.</td>
</tr>
<tr>
<td>User-defined configuration for Oracle Sales Cloud for Outlook:</td>
<td>Add to the standard Microsoft Outlook view, or rearrange how the page looks, using Oracle Sales Cloud for Outlook’s user-defined objects, fields, and User Interface layout options. For example, user-defined objects or objects that you rely on can be added to the application to cater to specific organizational or user requirements.</td>
</tr>
</tbody>
</table>

Initial Tasks for Outlook
Implement Oracle Sales Cloud for Outlook: Explained

Before using the Oracle Sales Cloud for Outlook application, several setup tasks must be performed. Some of these are Oracle Sales Cloud-specific tasks that are done by the environment hosting team or the customer implementation team. Other tasks are related to setting up the users’ computers to use the application, including the install and initialization of the extensions to Microsoft Outlook (Outlook). These tasks are described in more detail in the sections that follow.

For details on implementing Oracle Sales Cloud for Outlook, see the Oracle Sales Cloud for Outlook Deployment Guide on My Oracle Support (support.oracle.com).

For information on supported software versions, see http://www.oracle.com/us/products/system-requirements/overview/index.html.

Overview of Oracle Sales Cloud-specific Setup Tasks

At a high level, the following are the Oracle Sales Cloud-specific setup tasks involved in implementing Oracle Sales Cloud for Outlook:

- Required: Install Oracle Sales Cloud including the Oracle Sales Cloud for Outlook application.
- Optional: Perform customization and security changes for Oracle Sales Cloud for Outlook, after initial setup.

Overview of Setup Tasks Required for Each Computer Running Oracle Sales Cloud for Outlook

At a high level, the following are the setup tasks required for each computer that will run Oracle Sales Cloud for Outlook:

- Required: If not already present, install Microsoft .NET framework version 3.5 SP1 (or later).
- Required: Download and install the Oracle Sales Cloud server certificate.
- Required: Download and run the Oracle Sales Cloud for Outlook installer.
- Required: Complete First Run Assistant to set up application options and perform initial synchronization to get Outlook configuration and user data from the Oracle Sales Cloud application.
Implementation Task Flow Overview

The overall process flow for implementing Oracle Sales Cloud for Outlook is shown in this section.

### Oracle Fusion Tasks

1. Install Fusion CRM, including CRM for Microsoft Outlook
2. Perform Fusion setup tasks for Common Components, Customer Center, Sales, and Marketing
3. Perform customization and security changes for CRM for Microsoft Outlook, after initial setup

### Tasks for Each Computer Running CRM for Microsoft Outlook

1. Ensure .NET Framework 3.5 (or later) is installed on every client machine running CRM for Microsoft Outlook
2. Download and install the Fusion CRM server certificate
3. Download and run the CRM for Microsoft Outlook installer
4. Complete First Run Assistant

### Sales Cloud-specific Implementation Tasks

Following are the Oracle Sales Cloud for Outlook implementation tasks specific to Oracle Sales Cloud.

1. Install Oracle Sales Cloud Applications suite

   As a prerequisite setup task, provision the server environment and install the Oracle Sales Cloud Applications suite. This task is typically completed by the hosting operations team or customer implementing the Oracle Sales Cloud Applications suite and is the basis for the rest of the setup steps described in this section.

2. Perform Oracle Sales Cloud setup tasks for functionality used by Oracle Sales Cloud for Outlook

   Because Oracle Sales Cloud for Outlook allows users to access and manage their Oracle Sales Cloud data in Microsoft Outlook, it is necessary to complete the required setup tasks for the relevant Oracle Sales Cloud functionality. For example, the following setup tasks must be completed before using Oracle Sales Cloud for Outlook:

   - Set up reference data, such as: address and phone formats, currencies, geographies, and resources.
   - Set up Sales Cloud functional areas exposed in Oracle Sales Cloud for Outlook, such as: calendar and task management, customer and contact management, lead management, and opportunity and revenue management, including the sales product catalog.
3. Optionally, Oracle Sales Cloud for Outlook can be configured by completing these Outlook-specific setup tasks:
   - Configure Oracle Sales Cloud for Outlook client configuration files: Configure only if Outlook client customizations are needed
   - Configure Oracle Sales Cloud for Outlook client deployment packages: Configure only if Outlook client customizations are needed
   - Configure Oracle Sales Cloud for Outlook server configuration file: Configure only if Outlook configuration includes references to new services

Other, security-related tasks, performed in Oracle Sales Cloud Authorization Policy Manager (APM), may be necessary depending upon your applications configuration. Perform these tasks after initial setup, as needed. If new job roles are created, you will need to associate these new roles with the predefined data privileges and Outlook configuration packages. If you create custom Outlook deployment packages, there are additional steps required.

**Non-Sales Cloud Implementation Tasks**

Following are the non-Oracle Sales Cloud implementation tasks for Oracle Sales Cloud for Outlook.

- Verify Microsoft .NET Framework 3.5 SP1 or higher is installed on all computers that run Oracle Sales Cloud for Outlook.
- Verify each user has a Microsoft Exchange mail profile configured with Cached Exchange Mode (which supports offline storage in an .ost file format) or has a separate personal folders storage (in .PST file format) to store CRM data.
- Deploy the Oracle Sales Cloud public certificate into users’ Personal and Trusted Root Certificate Authorities directories on users’ computers. The certificate is provided by the environment hosting team or the group implementing Oracle Sales Cloud.
- Verify that each user can access the Oracle Sales Cloud for Outlook installer from the download page in the Sales application. The download page is accessible from the application preferences menu.

**Run Oracle Sales Cloud for Outlook Installer**

Each user must run the Oracle Sales Cloud for Outlook installer on his/her computer. See the related topic, Deploying and Installing Oracle Sales Cloud for Outlook: Explained, for more information.

**Creating Deployment Packages: Explained**

In Oracle Sales Cloud for Outlook, deployment packages contain metadata files that describe the Sales Cloud application extensions deployed to users’ computers. To provide users access to a new client configuration, you can either create a new deployment package or create a new instance of an existing package, as discussed in the following sections.

**Create New Deployment Package**

When you create a new package, in addition to activating it, you must configure a data security policy that allows users to access the package. This secondary task is done in Oracle Sales Cloud Authorization Policy Manager (APM) and involves the following steps:

1. In the top left section of the APM application window, use global search to search for Database Resources using search criteria equal to `Outlook`. This should return the result, Outlook Edition Metadata Package.
2. Select the Edit button on the Search Results pane to edit the Outlook Edition Metadata Package database resource.
3. In the Edit Database Resource tab, select the Condition tab and create a new condition on the database resource. Specify any unique name/display name, and set the SQL predicate to `package_name = '<name_of_deployment_package>'` (for example, `package_name = 'NewOutlookPackage'`).
4. Select the Submit button to commit the change.
5. Repeat step 2. In the search results pane, select Edit to reopen the Edit Database Resource page to edit the Outlook Edition Metadata Package database resource.
6. In the Edit Database Resource tab, select the Policy tab, and select the policy that should have access to the new package (for example, ZOE_SALES_MGR_OUTLOOK_DUTY), and then select Edit.
7. In the lower section of the page, select the Rule tab.
8. Select the lookup control next to the condition field and select the new condition created in step 3.
9. Select Submit to commit the changes.

Create New Instance of Existing Package
When you use an existing package, you create a new instance of the package with different configuration files. When using this method, you must inactivate the previous instance and activate the new instance. There is no need to configure a data policy when creating a new instance of an existing deployment package.

Deploying and Installing Oracle Sales Cloud for Outlook: Explained
Oracle Sales Cloud for Outlook includes a Microsoft Outlook add-in that must be deployed and installed on each user’s computer. The installer file is available from the Oracle Sales cloud for Outlook preference page in Oracle Sales Cloud.

User-Managed Deployment
Users can complete the installation by running the CRM for Microsoft Outlook.msi file on their computers. The Outlook application must be closed during this process. During the install, the user will specify:

- The install directory
- The Outlook mail profile to use

Automated Deployment using Batch Scripting
An alternative to users installing Oracle Sales cloud for Outlook themselves is for the installer to be deployed to user computers by the administrator using Windows Group policies, Microsoft System Center Configuration Manager (SCCM), or other desktop software deployment mechanisms. In this case, the administrator will access the installer file from the appropriate preference page in the Oracle Sales Cloud application and write a batch script to run the installer with several default parameters, such as the install directory, the mail profile to install to, and all of the elements of the connect string.

The following sample batch script shows how the installer installation can be automated:

```bash
msiexec /i "Oracle Fusion CRM for Microsoft Outlook.3.00.50.msi" OL_PROFILE=$DEFAULT FUSION_SERVER_HOST="hostedappserver.com" FUSION_SERVER_PORT="443" FUSION_SERVER_SUFFIX="outlookEditionConnector/OutlookRequestHandlerService" FUSION_SERVER_PROTOCOL="https" /QR
```

The parameters in the script include the following:

- The name and relative path to the installer file. In the example, the script assumes that the .msi file is in the same directory as the batch script.
- OL_PROFILE: This is the name of the user’s Outlook mail profile. Besides the mail profile name itself, predefined values can be provided (for example, $DEFAULT and $PREFERRED). When using $DEFAULT, the default mail profile will be selected. When using $PREFERRED, the installer will try to use the default profile first, but if it doesn't satisfy the mail profile configuration requirements (if it doesn't use Cached Exchange Mode or use Personal Folders storage) then the installer will try to use another profile.
- FUSION_SERVER_HOST: This is the server name or IP address.
• FUSION_SERVER_PORT: This is the port that Oracle Sales cloud for Outlook is configured to use.
• FUSION_SERVER_SUFFIX: This is the URL suffix for accessing the Oracle Sales cloud for Outlook Web services. The one provided in the example above is the default deployment path for the Oracle Sales cloud for Outlook application, and it will typically be used.
• FUSION_SERVER_PROTOCOL: This is either "http" or "https", depending on whether the application is deployed with SSL enabled or not.

Note that the script is using the standard switches provided by the Microsoft Installer executable, msiexec.exe. Documentation of the switches can be reviewed by typing `msiexec.exe /?` at the command prompt.

Completing the Application Setup after Installation

Once the installer finishes, the first time the user opens Outlook there will be additional dialogs that prompt the selection of various application options. This process is called the First Run Assistant, and each user will specify:

• The Oracle Sales Cloud username and password.
• The Oracle Sales cloud for Outlook connect string. Note that if the installation was completed with the various FUSION_SERVER_* variables, the connect string will already be populated and the user will not need to specify those details.

Once the user credentials and connect string are provided, the application will connect to Oracle Sales Cloud to download and apply the Outlook configuration available to the user. Once the configuration is applied the user is presented with additional First Run Assistant dialogs to complete the personalization process and perform an initial synchronization. In this second phase of the First Run Assistant, the user will specify:

• Synchronization settings, including the default synchronization frequency and synchronization filters. The application synchronizes data based on synchronization filters, and will automatically initiate a synchronization on the specified frequency.
• Whether to share new Appointments, Contacts, and Tasks in Oracle Sales Cloud for Outlook by default.
• Whether to convert his contact list to Oracle Sales Cloud contacts.

Once the user completes the First Run Assistant, the application will begin the first synchronization.

Supported Software for Oracle Sales Cloud for Outlook: Explained

Before using the Oracle Sales Cloud for Outlook application, several setup tasks must be performed. One of these tasks is to verify that each user’s computer has the necessary supported software prior to installing the application.

Refer to the System Requirements for Oracle Applications Cloud web page using the following URL: http://www.oracle.com/us/products/system-requirements/overview/index.html

How do I enter connection information for Oracle Sales Cloud for Outlook if I am a cloud customer?

The Oracle Sales Cloud for Outlook Assistant appears when you access Microsoft Outlook for the first time after installing Oracle Sales Cloud for Outlook. Click on the Oracle Sales Cloud for Outlook Assistant to be prompted to enter your login information. Enter your user name and password, and enter the server information as either `crm-aufs4x0[POD].oracleoutsourcing.com` or `crm-lufs9x[POD].oracleoutsourcing.com`. Replace [POD] with your three letter pod identifier.
How can I change the maximum size of an e-mail attachment downloaded during synchronization?

You cannot change the size of an e-mail attachment downloaded during synchronization. The default maximum size of an e-mail attachment that you can download during synchronization is 10 megabytes.

Implementation Concepts for Outlook

Oracle Sales Cloud for Outlook and the Sales Cloud Server: How They Fit Together

Oracle Sales Cloud for Outlook is a composite application that allows users to work with Oracle Sales Cloud data inside Microsoft Outlook. The application is deployed to Outlook using the add-in framework and extends the Outlook data model and UI framework in order to store and render Oracle Sales Cloud data to the user.

How Oracle Sales Cloud Data is Displayed in Oracle Sales Cloud for Outlook

Oracle Sales Cloud data is synchronized to users’ computers and maintained in native Microsoft Outlook storage. While working in Outlook, users access Oracle Sales Cloud data that is stored locally, even when connected to the corporate network. The changes made to the Oracle Sales Cloud data are periodically synchronized with the Oracle Sales Cloud application. There are two options for storing the Sales Cloud data:

- A Microsoft Outlook mail profile configured to use a Microsoft Exchange service with the Use Cached Exchange Mode enabled to allow data to be stored in an offline storage file (.ost file format)
- A Microsoft Outlook mail profile configured to use the Internet E-Mail service with personal folder storage (.pst file format)

Because Oracle Sales Cloud data is maintained in Outlook storage, it can be displayed and accessed like any other Outlook item. For instance, Oracle Sales Cloud data types will appear in the folders for the user’s mailbox alongside other native Outlook types, and users can select the Oracle Sales Cloud folder and view the Oracle Sales Cloud records there as they would work with other Outlook information. Within a given folder, the user can select and open a single record to view the data. In this case, the user will have access to Oracle Sales Cloud data that appears within an Outlook form or inspector window.

In addition to accessing Oracle Sales Cloud data in Outlook explorer views and inspector windows where the Oracle Sales Cloud data is the primary focus, users will also be able to access Oracle Sales Cloud context when viewing standard Outlook items like appointments, e-mails, and tasks. For these Outlook types, the user will be able to specify the Oracle Sales Cloud customer, related sales item, contacts, and resources associated with the Outlook item, and will be able navigate to the related Oracle Sales Cloud item to review additional details.

Data that is stored in either cached Exchange mode in .ost file format, or in personal folders in .pst format, is accessible to the Oracle Sales Cloud for Outlook user while disconnected. The user interacts with the Oracle Sales Cloud data that is stored locally on his computer and periodically synchronizes data between Outlook and the Oracle Sales Cloud server. Synchronization happens when the user is connected to the corporate network and can access the Oracle Sales Cloud application server. Because the user always works with the local set of Oracle Sales Cloud data, he will have access to the data from the server immediately following the synchronization process, but doesn’t directly access or update the data on the
Overview of the Synchronization Process

After Oracle Sales Cloud for Outlook is installed, the user must perform an initial synchronization to retrieve his accessible Oracle Sales Cloud data. Several synchronization settings are configured as part of the First Run Assistant process that influence the initial synchronization. These include the frequency of automatic synchronization, the synchronization filters to use, and which objects are enabled or disabled from synchronization. These settings can be changed by the user after the initial synchronization. Once the user completes the First Run Assistant process, the initial synchronization will begin. The duration of the synchronization process will depend on the number of records that will be synchronized, network bandwidth, load on the server, as well as processing speed and memory available on the user’s computer. A rule of thumb is to try to configure synchronization filters so that no more than five to ten thousand records are synchronized.

During the synchronization process, the application performs the following steps:

1. Connects to the Sales Cloud server Oracle Sales Cloud for Outlook synchronization services using SOAP over HTTP and authenticates the user.
2. Performs a check to determine the configuration for which the user possesses access. Access to an Outlook configuration is established based on a privilege associated with a user’s job role that allows access to an Outlook client deployment package.
3. If a user has access to a deployment package, it is downloaded, and the configuration is applied to the Outlook mailbox.
4. The final step is to synchronize data. The records that are retrieved depend on the internal filters configured on the server, data security applied to the objects that are synchronized, and the user filters.

Subsequent synchronization cycles follow a process that includes these steps:

1. Oracle Sales Cloud for Outlook sends a request to the Oracle Sales Cloud server with a list of objects and the current user filters and requests a snapshot of IDs and time stamps for all records that are within the scope of the object list and specified filters.
2. The server sends a response with the requested information.
3. Oracle Sales Cloud for Outlook makes a local snapshot of IDs and time stamps and compares that to the server snapshot.

The differences between the local snapshot of IDs and time stamps and the server snapshot result in a few possible actions:

- Inserts, updates, or deletes data on the Oracle Sales Cloud server based on changes that occurred in Oracle Sales Cloud for Outlook since the prior synchronization.
- Inserts, updates, or deletes data in Oracle Sales Cloud for Outlook based on changes that occurred on the Oracle Sales Cloud server since the prior synchronization.

In all cases, changes that are made to data locally in the Oracle Sales Cloud for Outlook client are only sent to the Oracle Sales Cloud server during the subsequent synchronization session; however, users who want to synchronize a change or set of changes immediately can start the synchronization cycle manually to avoid waiting for the next scheduled synchronization.

About Web Services Usage During Synchronization

The synchronization process on the Oracle Sales Cloud server is supported by Oracle Sales Cloud for Outlook accessing Web services. Oracle Sales Cloud for Outlook accesses two Web services directly -- one that provides access to data during synchronization processing, and one that provides access to metadata. The synchronization process is initiated by Oracle Sales Cloud for Outlook within the Outlook application, and the Oracle Sales Cloud server accepts synchronization requests,
routes them to the appropriate services within the service, and returns the appropriate responses. The work that each part of the synchronization architecture performs is summarized as:

1. **Oracle Sales Cloud for Outlook synchronization engine and connector** that are deployed to Microsoft Outlook perform the following:
   - Initiates a new synchronization request based on a preconfigured automatic synchronization interval or by an ad hoc user request to start a new synchronization cycle.
   - Uses the stored details about username, password, server connection information, and Oracle Sales Cloud public security certificate stored on the user’s computer to format and send requests to the Oracle Sales Cloud application server.
   - Based on the configuration deployed to a user’s computer (including object types deployed), fields defined as part of those objects, synchronization filters and the like, the application generates the appropriate SOAP message content and expects the corresponding response when using the HTTP or HTTPS transport to communicate with the Oracle Sales Cloud application server.

2. The **Oracle Sales Cloud server** hosts an application that listens for Oracle Sales Cloud for Outlook synchronization requests, and the synchronization services perform the following:
   - The OutlookRequestHandlerService Web service processes all incoming requests for data synchronization, and the OutlookMetadataService Web service handles requests to retrieve metadata.
   - Incoming SOAP messages are routed to the appropriate service. These messages include one or more requests to invoke a method on the target service.
   - Requests sent to the OutlookRequestHandlerService in particular are routed to other services to perform the action expected from the synchronization process. For instance, a request to get appointment data sent to the OutlookRequestHandlerService will be routed to the appointment Web service that will process the request and return the requested data, and the OutlookRequestHandlerService will send this back to the Oracle Sales Cloud for Outlook client that sent the request.

A synchronization cycle will include requests to get a server snapshot, and can then include many additional requests to query, insert, update, and delete data based on the changes detected when Oracle Sales Cloud for Outlook compares the local and server snapshots.

   - Each of these requests is processed based on the type of request, and is either managed within the OutlookRequestHandlerService processing directly or is routed to the appropriate target service to be fulfilled.

### Extensions to the Standard Outlook User Interface

In addition to standard Outlook data storage mechanisms and the synchronization engine, several extensions to the standard Outlook user interface provide a way to access and manage Oracle Sales Cloud data inside of Outlook. Examples of extensions to the standard Outlook user interface include custom toolbar buttons, menu items, inspectors that display Oracle Sales Cloud data, controls that are embedded on standard Outlook item inspectors, the personalization options dialog box, and so forth. The Oracle Sales Cloud for Outlook client can use these extensions to perform a variety of tasks.

The following are some examples of tasks that the user can perform:

- Create, view, and edit Oracle Sales Cloud data in Outlook.
- Mark an Outlook item to be shared with Oracle Sales Cloud for Outlook and associated sales data.
- Initiate a standard Outlook action, such as sending an e-mail or scheduling a meeting in the context of a sales item.

The behavior of the extended Outlook user interface is influenced by custom Oracle Sales Cloud business logic that performs a variety of validations during data entry. The following are some examples of validation that are performed:

- Confirm that the data type is valid for a given field.
- Make sure fields that are required are populated.
• Prevent changes to fields or records that are configured to be read-only.
• Validate field values based on comparisons with other fields or static values.
• Apply conditional validation so that a field may be required or read-only based on other criteria.

Physical Components that Oracle Sales Cloud for Outlook Architecture Uses

Following are the major physical components that Oracle Sales Cloud for Outlook uses:

1. Oracle Sales Cloud Database
   This is the database accessed by the Oracle Sales Cloud application that stores data about customers, contacts, business opportunities, and so on.

2. Oracle Sales Cloud Application Server
   This is the server that hosts the Oracle Sales Cloud for Outlook application and the related Outlook Web services, and therefore is the main entry point for synchronization requests coming from the Oracle Sales Cloud for Outlook add-in running on users' computers.

3. Laptop or Desktop
   This is the computer where the Oracle Sales Cloud for Outlook add-in is installed, and where users are working with Oracle Sales Cloud data in Outlook. The Outlook add-in will install binary files that support synchronization of Oracle Sales Cloud data and integration with Outlook, including support to extend the Outlook data model and user interface, and resource files containing images and strings to initialize the application. The Oracle Sales Cloud for Outlook add-in will connect to the Oracle Sales Cloud application server and download the appropriate configuration and Oracle Sales Cloud data for the user which are also stored on this computer.

4. Corporate Messaging Infrastructure
   The corporate messaging infrastructure encompasses all of the server computers and other network topology that support the transmission of e-mail messages, and other personal information management capabilities such as the corporate calendar, contact and task lists.

Oracle Sales Cloud for Outlook Functional Components

Following are the Oracle Sales Cloud for Outlook functional components:

1. Oracle Sales Cloud Extensions in Outlook
   Extensions integrate with Outlook data storage and deliver additional business logic and extensions to the Outlook user interface to allow users to access and modify Oracle Sales Cloud data. Oracle Sales Cloud data is viewed with extensions to the Outlook user interface. Changes to Oracle Sales Cloud data are controlled by business logic and custom controls and then finally stored in Outlook data storage (for example, in a user's mailbox storage file). The user works with a version of the Oracle Sales Cloud application, as defined in the configuration deployed to the user's computer. Changes to Oracle Sales Cloud data since the last synchronization cycle are calculated by the synchronization engine during data synchronization with the Oracle Sales Cloud application server.

2. Synchronization Engine
   The synchronization engine handles requests to initiate a synchronization cycle and is responsible for structuring the requests that are sent to the server. For the initial and incremental synchronization cycles, the synchronization engine manages requests to count records available to the user; sends a request to generate a server snapshot; initiates the process to generate a local snapshot; compares the results; and calculates the necessary requests to be sent to the Oracle Sales Cloud application server to complete the synchronization of local and server data sets. The synchronization engine works in tandem with the connector to correctly format and transmit messages with the Oracle Sales Cloud application server.

3. Oracle Sales Cloud Connector
This part of the Oracle Sales Cloud for Outlook add-in is responsible for knowing how to connect and communicate with the Oracle Sales Cloud application server. The connector uses details such as the username, password, connect string, public security certificate, and client metadata to interpret requests from the synchronization engine to correctly format and send requests to the Oracle Sales Cloud application server. All details of the requests to send to the server are orchestrated by the synchronization engine, but the transmission of the requests and retrieval of the responses is done by the connector. The connector uses the details in the connect string to know where to send requests to the Oracle Sales Cloud application Web services.

4. Oracle Sales Cloud Application Web Service

Oracle Sales Cloud Web Service provides functionality to handle the user session, and to add, delete, modify, count, and list data objects that are required by the Web service connector.

What's a client configuration file?

The client configuration file describes a part of the application configuration that resides on your computer, and it extends the desktop application. Client configuration files can either describe a portion of the application logic implemented as Java script, or can be a declarative configuration of items, such as UI components or synchronization mappings implemented as XML. Each configuration file has a particular type. There can be more than one version of any file type at one time as long as the names differ, and only one file of any given type can be included in a deployment package.

What's a client deployment package?

In Oracle Sales Cloud for Outlook, a client deployment package is a collection of metadata files that describe the Oracle Sales Cloud application extensions that are deployed to users’ computers. Access to a deployment package is given to users through a privilege associated with their job role. When a user connects to the Oracle Sales Cloud application server to synchronize data from a desktop application such as Microsoft Outlook, the application determines if any changes to the package have occurred, and if so, it downloads the changes.

What's a client configuration validation file?

The client configuration validation file (.xsd) in Oracle Sales Cloud for Outlook describes the structure of a valid client configuration file (.xml). The application uses the client configuration validation file to check that any client configuration file imported to the server is structured correctly and complies with the requirements of the validation file. The validation process happens automatically during the import of any client configuration file, and helps catch files that are not configured properly.

What's a server configuration file?

The Oracle sales Cloud for Outlook application uses a server configuration file to:

- Identify and map services
- View objects that are used when processing synchronization requests
- Query, insert, update, and delete data on the server

Only one of these files is used at a given time, and changes made to it are recognized by the application and loaded immediately.
29 Setting Up Gmail

Overview of Oracle Sales Cloud for Gmail

Oracle Sales Cloud for Gmail helps increase sales productivity by providing Oracle Sales Cloud capabilities within Gmail. Sales professionals can easily access the Sales Cloud data such as contacts, appointments and e-mails from their Gmail account.

Summary of Features

The key features of Oracle Sales Cloud for Gmail are:

- Synchronize contacts and appointments from Oracle Sales Cloud to Gmail and have a consolidated view in Gmail.
- Selectively choose which e-mails, contacts and appointments in Gmail are tracked in Oracle Sales Cloud.
- Link Sales Cloud Accounts, Contacts, Leads, Opportunities and Resources with e-mails, contacts and appointments in Gmail.
- Administrative filters to determine what contacts and appointments synchronize to Gmail to limit the Sales Cloud data in users' Gmail accounts.

Installing and Configuring Oracle Sales Cloud for Gmail: Explained

You can integrate Oracle Sales Cloud with your Gmail account and access your Oracle Sales Cloud contacts, appointments, and e-mails from your Gmail account. This topic explains how to install and sign in to the Oracle Sales Cloud for Gmail extension, how to upgrade to new versions, and how to uninstall.

To install Oracle Sales Cloud for Gmail, contact Oracle Support.

After the installation is complete, Oracle Sales Cloud for Gmail extension appears as a side panel on your Gmail when you open an appointment or an e-mail.

**Note:** If you installed the extension after signing in to your Gmail, you must refresh the page for the Oracle Sales Cloud for Gmail side panel to appear.

To uninstall the Oracle Sales Cloud for Gmail extension:

1. Navigate to Chrome Settings.
2. Click **Extensions**.
3. Find the Oracle Sales Cloud for Gmail extension and click the **Remove from Chrome** icon.
Signing in to Oracle Sales Cloud for Gmail

Once you sign in to Gmail, you must open an appointment or an e-mail for the Oracle Sales Cloud for Gmail side panel to appear.

To configure and sign in to Oracle Sales Cloud for Gmail:

1. Click the **Settings** icon on the side panel.
2. On the Sales Cloud Connection page, enter the host name.
   
   To obtain the host name, sign in to simplified UI, navigate to Accounts, and copy the first part of the URL, as indicated in the following image:

   ![Host Name Image]

3. Sign in using the salesperson user name and password that you use to sign in to Oracle Sales Cloud.

Upgrading to New Versions

Oracle Sales Cloud for Gmail detects when a new version of the extension is available and automatically upgrades you to the latest version. If your Chrome browser is open, the upgrade happens only when you restart the browser.

Oracle Sales Cloud and Gmail Synchronization: Explained

You can synchronize your contacts and appointments between Oracle Sales Cloud and Gmail. This topic explains how synchronization works when you create, update, or delete records in Oracle Sales Cloud or in Gmail.

New Records

Contacts and appointments that you create in Oracle Sales Cloud are added to Gmail during synchronization, based on the saved search criteria that you have defined. However, contacts and appointments that you create in Gmail are not synchronized with Oracle Sales Cloud. You can synchronize contacts and appointments with Oracle Sales Cloud only through the Oracle Sales Cloud for Gmail side panel.

*Note:* If you mark a new contact as favorite in Oracle Sales Cloud, the contact does not appear as favorite in Gmail.
Updated Records

Contacts and appointments that are already shared with Oracle Sales Cloud can be updated directly in Gmail or in the side panel.

- Updates in the side panel: If you update your record in the side panel, the record is updated in Oracle Sales Cloud as soon as you save your record.
- Updates in Gmail: If you update the record in Gmail, the record in Oracle Sales Cloud is updated during the next synchronization. Any updates to records in Oracle Sales Cloud are updated in Gmail during the next synchronization.

Deleted Records

You can delete records only in Oracle Sales Cloud. If you delete a shared contact or appointment in Gmail, the record is shared with Gmail again from Oracle Sales Cloud during the next synchronization.

Simultaneous Updates to Records

If contacts or appointments are updated simultaneously in Oracle Sales Cloud and Gmail, the updates in Oracle Sales Cloud are retained and synchronized with Gmail. Between synchronization cycles, even if a record is updated first in Oracle Sales Cloud and then in Gmail, the updates made in Oracle Sales Cloud are retained and synchronized with Gmail.

For example, your synchronization duration is set to run once every hour starting at 12.00 a.m. During the synchronization cycle between 2.00 p.m. and 3.00 p.m., a salesperson updates the mobile number of a contact in Oracle Sales Cloud at 2.10 p.m. You update the mobile number of the same contact on Gmail at 2.45 p.m. When synchronization runs at 3.00 p.m., your changes on the contact will be lost and the mobile number update on Oracle Sales Cloud will be brought down to Gmail although you made your change later in the synchronization cycle.

Related Topics

- Oracle Sales Cloud and Gmail Synchronization Settings: Explained

Scheduling Oracle Sales Cloud and Gmail Synchronization Job: Procedure

You can schedule jobs in Scheduled Processes on Oracle Sales Cloud to synchronize your contacts and activities between Oracle Sales Cloud and Gmail. This topic explains how you can set up a synchronization job for your Oracle Sales Cloud for Gmail.

Before you schedule jobs for synchronization, you must enable the profile options ZOE_GOL_ENABLE_ACTIVITY_SYNC and ZOE_GOL_ENABLE_CONTACT_SYNC so that the scheduled synchronization jobs run successfully.

To schedule a synchronization job:

1. Sign in to Oracle Sales Cloud as a sales administrator.
2. Click the Navigator icon, and click Scheduled Processes.
4. On the Schedule New Process dialog box, select Job as the Type.
5. Click the Name drop-down list and click Search.
6. Search for Synchronization Between Sales Cloud and Gmail.
7. Select Synchronization Between Sales Cloud and Gmail under the search results and click OK.
8. On the Schedule New Process dialog box, click OK.

The Process Details dialog box appears.

**Important:** If you want to run a one time synchronization, click Submit and synchronization occurs immediately.

9. Click the Advanced button.
10. On the Schedule tab, select Using a Schedule.
11. Select the frequency in which you want the process to run.

Set the synchronization frequency depending on your data volume. If synchronizations are set to run too frequently, some updates might not be processed. Set the frequency to a minimum of 5 minutes. If the data volume is low (less than 200 records updated in Oracle Sales Cloud and Gmail together), set the frequency to 5 minutes. However, if the data volume is high (more than 1000 records updated in Oracle Sales Cloud and Gmail together), set a frequency of 30 minutes.

12. Select the start and end dates.
13. Click Submit.

The job is now scheduled and synchronization takes place based on the frequency that you selected.
30 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. User 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
Chapter 31

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>
</table>
| Business Object Type           | • Narrows the search results to that specific business object within the selected product.  
                                 | • Enables the Show Attribute Details check box.                                       |

**Note:** This parameter is applicable only for the business objects that belong to Oracle Applications Cloud.

<table>
<thead>
<tr>
<th>Include Child Objects</th>
<th>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.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<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>
</tr>
</tbody>
</table>

| Show Attribute Details        | 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. |

| Show Extended Object Identifier Columns | 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. |

**Note:** 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.

**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>
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### Understanding Audit Policies

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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
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
32 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>
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<tbody>
<tr>
<td>Sales Cloud Account</td>
<td>accounts</td>
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<tr>
<td>Sales Cloud Contact</td>
<td>contacts</td>
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<tr>
<td>Sales Cloud Household</td>
<td>households</td>
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<tr>
<td>Activity</td>
<td>activities</td>
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<tr>
<td>Resource</td>
<td>resources</td>
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<tr>
<td>Leads</td>
<td>leads</td>
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<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>
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<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.

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<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,</td>
</tr>
<tr>
<td></td>
<td></td>
<td><a href="http://www.mydomain.com">http://www.mydomain.com</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Comma-separated list of origins, for example,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>n.com</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></td>
<td>Note: You must set a value for this header to enable CORS.</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</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OPTIONS, HEAD, GET, POST, PUT, PATCH, DELETE.</td>
</tr>
<tr>
<td>Access-Control-Allow-Headers</td>
<td>CORS: Access-Control-Allow-Headers (CORS_ACCESS_CONTROL_ALLOW_HEADERS)</td>
<td>Default values for allowed headers are</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Accept, Accept-Encoding, Cache-Control, Content-MD5, Content-Type, If-Match, If-None-</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Note: You must include Authorization, with a comma as the delimiter, to the</td>
</tr>
<tr>
<td></td>
<td></td>
<td>list of allowed headers. For example: Accept, Accept-Encoding, Cache-Control,</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Authorization</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
33 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.

**adjusted forecast**
Total forecast for all product items that meet forecast criteria plus a salesperson's adjustment amount, which can be a positive or negative number.

**adjusted territory quota**
The quota amount assigned to the user plus the adjustment amount entered.

**adjustment threshold**
Largest percentage of a quota that can be added as an adjustment.

**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 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.

customer attribute
A product owned by the customer or a customer attribute that has influenced the recommended product in past transactions. For example, if customers who bought product A also bought product B, then product A is an influencing customer attribute.

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.

**determinant**
A value that specifies the use of a reference data set in a particular business context.

**determinant type**
The value that affects sharing of reference data in a transaction across organizations, such as a business unit or a cost organization.

**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.

**dimension member**
Individual components of a dimension. For example, Japan is a member of the geography dimension.

**distinct values**
Count of distinct attribute values.

**document sequence**
A unique number that is automatically or manually assigned to a created and saved document.

**eligibility rule**
Rules that define what can or cannot be sold to what customers based on a set of eligibility or business criteria, such as due to company policy or customer eligibility constraints. Eligibility rules are evaluated before any recommendations can be made.

**forecast due date**
The date after which the forecast changes from current status to past status and no changes can be made to the forecast.
**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.

**infolet**
A small, interactive widget on the home page that provides key information and actions for a specific area, for example social networking or your personal profile. Each infolet can have multiple views.

**internal expert**
Experts within your company who have previous experience with a specific competitor.

**inventory organization**
A logical or physical entity in the enterprise that tracks inventory transactions and balances, stores definitions of items, and manufactures or distributes products.

**IQR**
Abbreviation for interquartile range. A measure of statistical dispersion being equal to the difference between the upper and lower quartiles. Upper and lower quartiles are the data ranges above 75 percent and below 25 percent of the total data population. The interquartile range is the middle 50 percent of the data in a segment.

**item master**
A collection of data that describes items and their attributes recorded in a database file.

**item validation organization**
The inventory organization that order management uses to identify the items that it displays and validates for a business unit. In order management, the inventory organization typically identifies a warehouse.

**lead**
A new prospect or existing customer who has interest or the potential for interest in a product or service being sold. The interest is represented in the application by a lead.

**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.
**lift**
Indicates the improvement in predictive ability when using association model prediction over randomness. The baseline for lift is 1. If the lift is greater than 1, it indicates that the predictive ability while using prediction is better than randomness.

**likelihood to buy**
Likelihood to buy, also called Confidence, is the ratio that shows the occurrences of the influencing customer attribute compared to occurrences of the recommended product. Likelihood to buy value ranges between 0 and 1, where 0 indicates no occurrence at all and 1 indicates 100% occurrence. Likelihood to buy closer to 1 indicates higher likelihood that the customer will buy the recommended product.

**line of business**
A particular kind of commercial enterprise. For example, a broad grouping of sellable products such as hardware or training.

**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.

**market potential**
Estimated revenue for sales leads and recommendations within a territory.

**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.

**nonrevenue quota**
A type of quota typically assigned to a sales resource with overlay sales roles, such as sales consultants or telemarketing representatives, to measure their performance.

**null percentage**
Refers to the percentage of attribute values that is null. Higher null percentage means the data is not well-populated.

**overlay territory**
A territory, usually owned by an internal employee, whose team supports the sales activities within the territory boundaries. Overlay territories often overlap with one or more prime or other overlay territories.

**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.
**prediction rules**
A user-defined business logic that identifies target customer segments for target products based on a set of criteria. Prediction rules predict the likelihood of target customers to buy a product, the average revenue, and the average sales cycle that salespeople could expect.

**predictive model**
Predictive models analyze past sales data to predict future sales potential. For example, models predict likelihood to buy, potential revenue, and estimated length of the sales cycle.

**primary ledger**
Main record-keeping ledger.

**prime territory**
A territory that is usually owned by an internal employee who is directly responsible for sales within the territory boundaries. Prime territories aim to assign sales representatives to each region where potential customers are located.

**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.

**qualified lead**
A qualified lead is one where the lead qualification status has been updated to qualified. Generally, a lead is considered qualified and ready for conversion to a sale when the need, purchase interest, and budget are confirmed.
Query By Example
The row of fields directly above table column headers, used for filtering the data in the table.

quota
A revenue target, often tied to expected performance.

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.

reference group
A logical collection of reference data sets that correspond to logical entities, such as payment terms defined across multiple tables or views. Based on the common partitioning requirements across entities, the reference data sets are grouped to facilitate data sharing among them.

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

resource organization
An organization whose members are resources. Resource organizations are used to implement sales organizations, partner organizations, and so on.

resource quota
The revenue target associated with a territory resource. Resource quota can be either revenue resource quota or nonrevenue resource quota.
**response**
A recorded reaction of a prospect or customer to a marketing activity.

**role**
Controls access to application functions and data.

**rule folder**
A folder that enables logical grouping of rules.

**rule support**
Ratio of occurrence of the influencing customer attribute and recommended product together over total number of records. Support value ranges between 0 and 1, where 0 indicates no occurrence at all and 1 indicates 100% occurrence. Rule support closer to 1 is better than that closer to 0.

**sales account**
Parties with the usage Sales Account and a sales account profile containing sales information specific to the party. When a party has one sell to address, it ceases to be a sales prospect and becomes a new sales account. When the party purchases something, it changes from a new to an existing sales account.

**sales campaign**
A sales campaign enables a salesperson to target customer contacts by e-mail in a personalized campaign, using marketing generated collateral.

**sales goal**
A business or sales objective represented as a measurable goal. A sales goal is defined by how it’s measured (amount or quantity), and whether or not the goal has a focus such as on specific product groups.

**sales promotion**
A business object used to offer special pricing, such as a percentage discount, free shipping, or a coupon.

**sales quota**
Territory and resource quota together compose sales quota.

**sales quota plan**
Plan that contains all quota activities for the fiscal year, created by the administrator. Actual sales and pipeline are tracked against only one quota plan for the year.

**set enabled**
A property that describes entities that an organization shares as reference data. For example, you can indicate a lookup, customer, location, or document attachment as set enabled.
**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.

**source territory**
A territory with one or more dimensions inherited by at least one recipient territory.

**springboard**
The grid of icons on the home page or the strip of icons above all simplified pages. Use the icons to open pages.

**standard deviation**
A measure of deviation of a set of data from its mean. If the data is spread out over a large range of values, the deviation is higher.

**suggestion group**
Category of suggestions that appear in the autosuggest for the global search.

**SWOT**
Abbreviation for strengths, weaknesses, opportunities, and threats. SWOT analyses score the strengths, weaknesses, opportunities, and threats of a sales competitor, as compared to the selling company.

**territory**
The jurisdiction of responsibility of a salesperson or sales manager over a set of customers. Territories serve as a basis for forecasting, quota, compensation, and analysis of sales performance.

**territory coverage**
A territory coverage is a set of boundaries that define what is included or excluded in the territory and what can be sold. Selected customers or partners can be selected to be included or excluded from the territory being defined. For example, sell all products in North America.

**territory freeze date**
The date after which forecasting stops accepting territory hierarchy changes for the scheduled forecast and forecasting activities can begin.

**territory owner**
Resource assigned to manage a territory and is typically accountable for the work objects, such as opportunities, that are within the boundaries of the territory.
territory proposal
A sandbox container used to model territory changes. All valid territories within a proposal become active on the proposal activation date.

territory quota
The revenue target associated with the expected performance of a territory.

unit of measure
A division of quantity that is adopted as a standard of measurement.

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.