

Oracle® Cloud

Manage Discount Requests



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Preface

This document describes how to install, configure, and run this recipe in Oracle Cloud Infrastructure Process Automation.

Topics:

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Related Resources

For more information, see these Oracle resources:

- Oracle Cloud Infrastructure Process Automation documentation in the Oracle Cloud Library on the Oracle Help Center.
- Oracle Cloud at <http://cloud.oracle.com>.

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
<i>italic</i>	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

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About This Recipe

Use this recipe to manage discount approvals for a sales team through Oracle Cloud Infrastructure Process Automation.



Note:

The recipe is meant only for guidance and is not warranted to be error-free.

Overview

This recipe provides a mechanism to manage the discount-approval lifecycle for a quote associated with a sales opportunity.

To use the recipe, you must create a process application using the recipe, and configure the roles and other resources of the recipe. When a sales representative submits a discount request (with opportunity, quote, and discount details), the process flow of the recipe is triggered. It directs the request to a sales manager for approval of individual items in the request, and then to a regional sales manager for an overall approval. If the request is approved, the process flow can communicate the discount approval to an external system (for example, a CRM system) for recording. For this, you'll have to configure a connector to the third-party system. Finally, a confirmation message is sent to the sales representative's email address.

System and Access Requirements

- Oracle Cloud Infrastructure Process Automation, Version 23.12 or higher

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Perform Prerequisite Tasks

You must perform the following configuration tasks on your Oracle Identity Cloud Service (IDCS) instance in order to successfully run the recipe.

- Assign IDCS application roles
- Create the required users in IDCS

For details, see [Manage Access and Assign Roles](#).

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Select and Configure the Recipe

On your Oracle Cloud Infrastructure Process Automation instance, create a process application using the recipe to deploy and configure the recipe's resources.

1. On the Designer home page, click **Create**. In the Create application pane, select **Create application from recipe**.
2. Find the recipe of your choice, then click **Select**.
The Create application from recipe pane opens.
3. Review the name, version, and description for the application, and click **Create**.
The process application's main page opens, displaying all the resources of the recipe. Configure the following resources before you activate and run the application.

Configure Roles

1. Click the **Roles** tab to view the roles present in the process application. The following roles are displayed:
 - **Sales Representative**: Users that request quote discounts for products on behalf of customers.
 - **Sales Manager**: Users that approve the individual products in a request.
 - **Regional Sales Manager**: Users that approve an entire request.
 - **Process Owner**: Users that handle the CRM updates.
 - **Process Reviewer**: Users that review the requests.
2. Assign the right users to each role.
 - a. Click a role to open the page that lists the users, groups, and permissions for the role.
 - b. Delete the default users assigned, if any.
 - c. In the **Search by** drop-down field, select **Users**.
 - d. In the **Search for users or groups** field, search and select a user.
The user you select is added to the role.
 - e. Select the necessary permission for the user in the Application Permission Level section.
3. To return to the process application's main page, click the application's name in the breadcrumb.

Configure Connectors

Optionally, add connectors to your application to connect to third-party systems, and record the approved discounts for quotes. You can create a connector to an external CRM application. See Configure REST Connectors in Designer.



Note:

Without connectors, you can only test run this application in the Process Workspace.

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Activate and Run the Recipe

After you've configured the roles and other resources, you can activate and run the application.

1. On the process application's main page, click **Activate**. In the Activate pane, with the default snapshot selected, click **Activate**.

A message confirms that the application has been activated.

2. Run the recipe.

- a. In the Activate pane, click **Test in Workspace**.

A new browser tab opens with Workspace.

- b. Log in as a user with the Sales Representative role, and click the activated application on the Start Requests page.

- i. In the pane that appears, complete the form and click **Submit** to start an instance of the application.

You'll receive a notification about your request approval on the email address you provide in the form.

- c. Log in as a user with the Sales Manager role, open the Workspace navigation menu, and click **Tasks** to open the Tasks page.

- i. Under the **My tasks** tab, click the task from the discount approval process.

- ii. In the task details pane, review and update (if required) the form associated with the task, and then click **Approve**.

- iii. Repeat the Steps 2(c)(i) and 2(c)(ii) for all tasks associated with the process.

- d. Log in as a user with the Regional Sales Manager role, open the Workspace navigation menu, and click **Tasks** to open the Tasks page.

- i. Under the **My tasks** tab, click the task from the discount approval process.

- ii. In the task details pane, review and update (if required) the form associated with the task, and then click **Approve**.

3. Track the running of the process instance in the Workspace. See Track Processes.

4. View the runtime execution details of your process in **Analytics**. See Use Analytics.

5. Log in to the sales representative's email account specified in the form, and check for the message from Oracle Cloud Infrastructure Process Automation.

The email message contains the approval details for your discount request.

Related Documentation

- *Using Oracle Cloud Infrastructure Process Automation*