

CX for Industries

Implementing Financial Services

April 2023

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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

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1 About This Guide

Audience and Scope

This guide is intended for anyone involved in setting up the Financial Services industry solution.

You must perform the implementation steps covered in this guide either while implementing or after implementing Oracle CX Sales. The guide doesn't cover the implementation activities for Oracle CX Sales.

If you want to set up and work with the additional features of Oracle CX Sales, see Oracle CX Sales documentation on Oracle Help Center at <https://docs.oracle.com>.

Related Guides

Refer to the related guides listed in the following table to understand more about the implementation tasks covered in this guide.

Table

Title	Description
Oracle CX Sales Getting Started with Your Sales Implementation	Describes how to set up sales automation capabilities in Oracle CX Sales and Oracle B2B Service using a case study to describe concepts and procedures.
Oracle Applications Cloud Configuring Applications Using Application Composer	Describes how to use runtime tools such as Application Composer or flexfields to configure Oracle Applications Cloud.
Oracle CX Securing CX Sales and B2B Service	Describes how to enable user access to Oracle CX Sales and Oracle B2B Service functions and data.

2 Implementation Overview

Setup Tasks List

This topic provides a summary about the tasks that you must perform to set up Oracle CX Sales for Financial Services.

You can use the following table as a checklist to understand the sequence of the tasks and where you perform them. The tasks are categorized based on configuration tools or composers that you typically use to configure and modify your application.

Setup Activity	Work Area and Tasks
Importing Roles and Privileges	Security Console
Creating Roles	Security Console
Assigning Roles to Layouts	Application Composer: Custom Objects
Adding Users to Job Roles	Security Console
Renaming Account to Companies	Application Composer: Common Setup
Performing Page Composer Configurations	Structure
Configuring KPI Dashboard	KPI Dashboard
Configuring Reports	Edit Pages: Job Role
Configuring Web Services	Application Composer: Common Setup
Configuring Sales Organization	Setup and Maintenance work area: Manage Common CRM Business Unit Profile Options
Setting Up Intelligent Advisor	Intelligent Advisor Hub
Configuring Open Authorization	Intelligent Advisor Hub
Configuring Item Types	Setup and Maintenance work area: Manage Standard Lookups
Setting Up Profile Option	Setup and Maintenance work area: Manage Administrator Profile Values

Setup Activity	Work Area and Tasks
Configuring Import and Export	Application Composer: Common Setup
Configuring Sales Processes	Setup and Maintenance work area: Manage Sales Methods and Sales Stages
Working with Role-Based Access and Security	Application Composer: Security
Hiding Dashboard	Structure
Enabling Households	Structure
Creating Job Roles for Assigning to Newly Provisioned Contacts for Case	Security Console
Adding Case Object View Access to the Newly Created Custom Role	Application Composer
Adding Data Security Policies	Security Console
Creating Job Roles for Adding Permission to Access User Provisioning Functionality	Security Console
Adding External Users to Oracle Social Network	Oracle Social Network: Administration
Creating Defaulted Tasks	Setup and Maintenance work area: Manage Standard Lookups
Adding Account Provisioning Lookup	Application Composer: Standard Objects
Creating Object Workflow	Application Composer: Common Setup
Enabling Conversations Subtab in Case	Setup and Maintenance work area: Manage Oracle Social Network Objects

You must perform the steps provided in this guide in conjunction with, or after completing the steps mentioned in Oracle CX Sales Getting Started with Your Sales Implementation guide.

3 Set Up Users and Roles

Import Roles and Privileges into Security Console

You must synchronize Security Console with the roles and privileges already available in the application before proceeding with the role creation or role copying steps.

Following are the steps:

1. Sign in to Oracle CX Sales as a user with **IT Security Manager** role.
2. On the Navigator, in Tools, click **Scheduled Processes**.
3. Click **Schedule New Process** button.
4. Corresponding to the Name drop-down list, click **Search**.
5. In the Search and Select: Name dialog box, enter **Import Users and Role** for the Name field and click **Search**.
6. In the Search Results, select **Import User and Role Application Security Data** and click **OK**.
7. Click **OK** in the Schedule New Process dialog box.
8. Click **Submit** in the Process Details dialog box.

Monitor the status and wait for the process to complete.
9. Verify and ensure that the process status is **Succeeded**.

Set Up Financial Services Roles Using Simplified Setup

You can set up the financial services roles such as commercial banker, commercial bank manager, retail banker, retail bank manager, and sales administrator using collateral provided or you can configure each role separately.

To set up all the financial Service roles using collateral, depending on the version that you require, download the AFS_Simplified_Setup_R131802 compressed file or the AFS_Simplified_Setup_R131805 compressed file available at Collaterals for Oracle CX for Financial Services (My Oracle Support Document ID 2077119.1). You must perform the following steps to use the collateral to set up the financial service roles:

1. Sign in to Oracle CX Sales using Application Implementation Consultant role.
2. Navigate to **Migration** in Tools.
3. Select **Incoming** tab.
4. Click **Browse** button.
5. Select the jar file.
6. Click **Apply** button.

Note: You have used simplified setup for setting up the financial services roles, so don't configure any of the financial services roles separately by following steps available in the Creating Roles for Retail Banking, Creating Roles for Commercial Banking, and Creating Administrator Roles for Financial Services topics in the Getting Started with Financial Services Implementation guide.

Create Roles for Retail Banking

You must create and configure the Retail Banker Job and Retail Bank Manager Job roles and map them to external roles such as Sales Representative and Sales Manager for working with retail banking features.

Note: You're required to create roles for the first time. Don't create roles in case of upgrades or while updating the existing configuration.

The following steps describe how to create the Retail Banker Job role. Repeat these steps to create the Retail Bank Manager Job role. You must manually configure these roles because they aren't shipped with Oracle CX Sales.

1. Sign in to Oracle CX Sales as a user with **IT Security Manager** role.
2. On the Navigator, in Tools, click **Security Console**.
3. On the Security Console, in the Roles subtab, search for **Sales Representative**.

The search displays role with the role name as Sales Representative.

4. Click the drop-down list button corresponding to the role name **Sales Representative** and code **ORA_ZBS_SALES_REPRESENTATIVE_JOB**. Select **Copy Role** option.
5. In the Copy Options dialog box, select the **Copy top role and inherited roles** option and click **Copy Role** button.

Copy Role: Basic Information page opens.

6. On the Copy Role: Basic Information page, specify information provided in the following table.

Field	Value
Role Name	Retail Banker
Role Code	AFS_RETAIL_BANKER
Description	Represents the business to sell its products to Customers. Maintains relationships with key customers, builds pipeline, manages leads and opportunities and performs sales forecasting.

7. Click **Load Inherited Policies** link in the **Functional Security Policies** train stop.
8. Add **View products** privilege.
9. Click **Summary and Impact Report** train stop.
10. Click **Submit and Close**.

Confirmation dialog box is displayed.

11. Click **OK**.
12. Verify **Role Copy Status** in the Administration subtab.

Wait for **Status** to display as **Complete**.

13. Repeat the steps for creating the Retail Bank Manager role with role code as **AFS_RETAIL_BANK_MANAGER**.

Note: Retail Bank Manager role must be a copy of Sales Manager role.

14. On the Copy Role: Basic Information page, specify information provided in the following table.

Field	Value
Role Name	Retail Bank Manager
Role Code	AFS_RETAIL_BANK_MANAGER_JOB
Description	Manages retail bankers within the organization. Generates revenue within a territory, builds pipeline, manages territory forecasts, and assists salespersons in closing deals.

Create Roles for Commercial Banking

You must create and configure the Commercial Banker Job and Commercial Bank Manager Job roles and map them to external roles such as Sales Representative and Sales Manager for working with Commercial Banking features.

Note: You're required to create roles for the first time. Don't create roles in case of upgrades or while updating the existing configuration.

The following steps describe how to create the Commercial Banker Job role. Repeat these steps to create the Commercial Bank Manager Job role. You must manually configure these roles because they aren't shipped with Oracle CX Sales.

1. Sign in to Oracle CX Sales as a user with **IT Security Manager** role.
2. On the Navigator, in Tools, click **Security Console**.
3. On the Security Console, in the Roles subtab, search for **Sales Representative**.

The search displays role with the role name as Sales Representative.

4. Click the drop-down list button corresponding to the role name **Sales Representative** and code **ORA_ZBS_SALES_REPRESENTATIVE_JOB**. Select **Copy Role** option.
5. In the Copy Options dialog box, select the **Copy top role and inherited roles** option and click **Copy Role** button.

Copy Role: Basic Information page opens.

6. On the Copy Role: Basic Information page, specify information as provided in the following table and click **Next**.

Field	Value
Role Name	Commercial Banker

Field	Value
Role Code	AFS_COMMERCIAL_BANKER_JOB
Description	Represents the business to sell its products to companies. Maintains relationships with key contacts of companies, builds pipeline, manages leads and opportunities, and performs sales forecasting.

7. Click **Load Inherited Policies** link in the **Functional Security Policies** train stop.
8. Add **View products** privilege.
9. Click **Summary and Impact Report** train stop.
10. Click **Submit and Close**.

Confirmation dialog box is displayed.

11. Click **OK**.
12. Verify **Role Copy Status** in the Administration subtab.

Wait for **Status** to display as **Complete**.

13. Repeat the steps for creating the Commercial Bank Manager role with role code as **AFS_COMMERCIAL_BANK_MANAGER_JOB**.

Note: Commercial Bank Manager role must be a copy of Sales Manager role.

14. Specify information as provided in the following table.

Field	Value
Role Name	Commercial Bank Manager
Role Code	AFS_COMMERCIAL_BANK_MANAGER_JOB
Description	Manages commercial bankers within the organization. Generates revenue within a territory, builds pipeline, manages territory forecasts, and assists salesperson in closing deals.

Create Administrator Roles for Financial Services

You must create administrator roles for financial services.

Note: You're required to create roles for the first time. Don't create roles in case of upgrades or while updating the existing configuration.

Following are the steps to create administrator roles for financial services:

1. Sign in to Oracle CX Sales as a user with **IT Security Manager** role.
2. On the Navigator, in Tools, click **Security Console**.
3. On the Security Console, in the Roles subtab, search for **Sales Administrator**.

The search displays role with the role name as Sales Administrator.

4. Click the drop-down list button corresponding to the role name **Sales Administrator** and code **ORA_ZBS_SALES_ADMINISTRATOR_JOB**. Select **Copy Role** option.
5. In the Copy Options dialog box, select the **Copy top role and inherited roles** option and click **Copy Role** button.

Copy Role: Basic Information page opens.

6. On the Copy Role: Basic Information page, specify information provided in the following table and click **Next**.

Field	Value
Role Name	Sales Admin for Financial Services
Role Code	AFS_SALES_ADMIN_FINANCIAL_SERVICES
Description	Manages sales department and personnel. Performs ongoing administrative tasks, corrects erroneous data, and modifies the application according to business needs.

7. Click **Load Inherited Policies** link in the Functional Security Policies train stop.
8. Click **Summary and Impact Report** train stop.
9. Click **Submit and Close**.

Confirmation dialog box is displayed.

10. Click **OK**.
11. Verify **Role Copy Status** in the Administration subtab.

Wait for **Status** to display as **Complete**.

4 Configure Page Layouts and Add Users to Roles

Assign Roles to Retail Banking Layouts

To use retail layouts for working with financial services features, you must first assign roles to retail layouts.

You perform this step using Application Composer, which is a browser-based configuration tool that enables you to configure and modify Oracle CX Sales.

For example, you can create new object and related fields, and then create new user interface pages where that object and its fields are exposed to users.

You can make your changes and see most changes take immediate effect in real time, without having to sign out and sign back in.

For more information on application composer, see Oracle Applications Cloud Configuring Applications Using Application Composer guide.

Using Application Composer, you can present the same Oracle CX Sales page to your users and display different page layouts depending on the conditions you define.

For example, a sales executive might see certain privileged fields on an opportunity record, which other sales team members can't see. Similarly, an open opportunity might have certain fields related to it being in progress, which won't display on a closed opportunity.

You can dynamically control the display of page layouts based on:

- Roles
- Groovy expression
- Type of record

For more information and examples on how you can use page layout, see Oracle Applications Cloud Configuring Applications Using Application Composer guide.

To assign a role to Retail Banking Layout:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Expand **Custom Objects**.
A list of custom objects opens.
4. Expand custom objects such as Financial Account.
5. Click **Pages**.
6. In the different Layouts regions in the Simplified Pages tab:
 - a. Select **Layout Statuses** as **All layouts** for all regions.
 - b. Select **FINS Retail Layout** in the Layout Name.
 - c. Select **Actions-Duplicate Layout**.

Note: For each object mentioned in the following table, create duplicate layouts with the roles mentioned in the table. When you duplicate the layout, make sure that you duplicate it from the layout with the name mentioned in the following table.

- d. In the Duplicate Layout dialog, enter the New Layout Name.
 - e. Click **Save and Close**.
7. After the duplicate layouts are created in both the regions, click Role column drop-down list, to open Select: Roles window, click specific role radio button, from **Available Roles** list and move **Retail Banker** and **Retail Bank Manager** roles into **Selected Roles** list. Click **OK**.
 8. Repeat steps 4 to 7 for all the duplicated layouts for the following objects:

Objects include Financial Account, Product, Transaction, Contact, Household, Opportunity, and Sales Lead.

Specify information as provided in the following table.

Object Type	Object	Specific Object (if any)	Landing Page (Layout Name)	Create Page (Layout Name)	Detail Page (Layout Name)	Roles
Custom	Financial Account	Not applicable	Not applicable	FINS Retail Layout	FINS Retail Layout	Retail Banker Retail Bank Manager
Custom	Transaction	Not applicable	Not applicable	FINS Retail Layout	FINS Retail Layout	Retail Banker Retail Bank Manager
Standard	Contact	Contact	Financial Services Retail Banking Layout	FINS Retail Layout	FINS Retail Layout	Retail Banker Retail Bank Manager
Standard	Household	Not applicable	Financial Services Retail Banking Layout	FINS Retail Layout	CX FINS Vertical Layout	Retail Banker Retail Bank Manager
Standard	Opportunity	Not applicable	Financial Services Retail Banking Layout	FINS Retail Layout	FINS Retail Layout	Retail Banker Retail Bank Manager
Standard	Sales Lead	Not applicable	Financial Services Retail Banking Layout	FINS Retail Layout	FINS Retail Layout	Retail Banker Retail Bank Manager

Object Type	Object	Specific Object (if any)	Landing Page (Layout Name)	Create Page (Layout Name)	Detail Page (Layout Name)	Roles
Standard	Product	Not applicable	Financial Services Vertical Layout	Not applicable	FINS Retail Layout	Retail Banker Retail Bank Manager
Standard	Product	Not applicable	Financial Services Administrator Layout	FINS Retail Layout	FINS Retail Layout for Sales Administrator	Sales Admin for Financial Services

Make the previously duplicated and existing layouts inactive to use new layouts. You must manually transfer any site level changes that you perform on the existing layouts to the new layouts.

Add Users to Financial Services Job Roles

You must add all the relevant users to the financial services job roles for enabling them to work with financial services features.

The following steps describe how to assign the Retail Banker Job role to users.

1. Sign in to Oracle CX Sales using Administrator role.
2. On the Navigator, in Tools, click **Security Console**.
3. In the Roles subtab, search for **Retail Banker** Job role.
The search results in the display of role with the role name as Retail Banker.
4. Click the drop-down list button corresponding to the role name **Retail Banker**. Select **Edit Role** option.
5. On the Edit Role: Basic Information page, click **Users** train stop.
Edit Role: Users page opens.
6. Click **Add User** button.
Add User dialog box opens.
7. Search for relevant users, select them, and click **Add User to Role**.
8. Click **OK** to confirm. Close the Add User dialog box.
9. Click **Summary and Impact Report** train stop.
Edit Role Retail Banker: Summary and Impact Report is displayed.
10. Click **Save and Close** to save the role changes.
11. Repeat these steps for **Retail Bank Manager**, **Commercial Banker**, **Commercial Bank Manager**, and **Sales Admin for Financial Services** roles.

Note: Run the **Import User and Role Application Security Data** job from **Scheduled Processes** to synchronize users and roles in Security Console. For more information to run the job, see Importing Roles and Privileges into Security Console.

For more information on creating sales users, see Oracle CX Sales Getting Started with Your Sales Implementation guide. For more information on creating application users, see Oracle CX Securing CX Sales and B2B Service guide.

Related Topics

- [Import Roles and Privileges into Security Console](#)

Assign Roles to Commercial Banking Layouts

To use commercial banking layouts for working with commercial banking features, you must first assign roles to commercial banking layouts.

You can perform this step using Application Composer, which is a browser-based configuration tool that enables you to configure and modify Oracle CX Sales. For example, you can create new object and related fields, and then create new user interface pages where that object and its fields are exposed to users. You can make your changes and see that most changes take immediate effect in real time, without the need to sign out and sign back in. For more information on application composer, see Oracle Applications Cloud Configuring Applications Using Application Composer guide.

Using Application Composer, you can present the same Oracle CX Sales page to your users and display different page layouts depending on the conditions you define. For example, a sales executive might see certain privileged fields on an opportunity record, which other sales team members can't see. Similarly, an open opportunity might have certain fields related to it being in progress, which won't display on a closed opportunity.

You can dynamically control the display of page layouts based on:

- Roles
- Groovy expression
- Type of record

For more information and examples on how you can use page layout, see Oracle Applications Cloud Configuring Applications Using Application Composer guide.

To assign a role to Commercial Banking Layout:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Expand **Custom Objects**.
A list of custom objects opens.
4. Expand custom objects such as Financial Account.
5. Click **Pages**.
6. In the different Layouts regions in the Simplified Pages tab:
 - a. Select **Layout Statuses** as **All layouts** for all regions.
 - b. Select **Commercial Banking Layout** for Layout Name.
 - c. Select **Actions-Duplicate Layout**.

For each object mentioned in the following table, create duplicate layouts with the roles mentioned in the table. When you duplicate the layout, make sure that you duplicate it from the layout with the name mentioned in the following table.

- d. In the Duplicate Layout dialog, enter the New Layout Name.

e. Click **Save and Close**.

7. After the duplicate layouts are created in both the regions, click Role column drop-down list, to open Select: Roles window, click specific role radio button, from **Available Roles** list and move **Commercial Banker** and **Commercial Bank Manager** roles into **Selected Roles** list. Click **OK**.
8. Repeat steps 4 to 7 for all the duplicated layouts for the objects provided in the following table.

Object Type	Object	Specific Object (if any)	Landing Page (Layout Name)	Create Page (Layout Name)	Detail Page (Layout Name)	Roles
Standard	Account	Not applicable	Financial Services Vertical Layout	Financial Services Vertical Layout	Commercial Banking Layout	Commercial Banker Commercial Bank Manager
Standard	Contact	Contact	Not applicable	Not applicable	Commercial Banking Layout	Commercial Banker Commercial Bank Manager
Custom	Financial Account	Not applicable	Not applicable	FINS Retail Layout	Commercial Banking Layout	Commercial Banker Commercial Bank Manager
Custom	Transaction	Not applicable	Not applicable	FINS Retail Layout	FINS Retail Layout	Commercial Banker Commercial Bank Manager
Standard	Opportunity	Not applicable	Commercial Banking Layout	Commercial Banking Layout	Commercial Banking Layout	Commercial Banker Commercial Bank Manager
Standard	Sales Lead	Not applicable	Commercial Banking Layout	Commercial Banking Layout	Commercial Banking Layout	Commercial Banker Commercial Bank Manager

Object Type	Object	Specific Object (if any)	Landing Page (Layout Name)	Create Page (Layout Name)	Detail Page (Layout Name)	Roles
Standard	Product	Not applicable	Financial Services Vertical Layout	Not applicable	FINS Retail Layout	Commercial Banker Commercial Bank Manager
Standard	Product	Not applicable	Financial Services Administrator Layout	FINS Retail Layout	FINS Retail Layout for Sales Admin	Sales Admin for Financial Services
Standard	Activity	Appointment	Commercial Banking Layout	Commercial Banking Layout	Commercial Banking Layout	Commercial Banker Commercial Bank Manager
Standard	Activity	Task	Commercial Banking Layout	Commercial Banking Layout	Commercial Banking Layout	Commercial Banker Commercial Bank Manager
Standard	Activity	Activities	Commercial Banking Layout	Not applicable	Not applicable	Commercial Banker Commercial Bank Manager

5 Rename Account to Companies

Rename Account to Companies for Commercial Banking

As part of the commercial banking flow, you must rename the Account object to Company.

Following are the steps to rename Account object to Company:

1. Sign in to Oracle CX Sales using Application Implementation Consultant role. Ensure that you're in a sandbox environment.
2. Navigate to Application Composer.
3. In Standard Objects, select **Account Object**.
4. Click **Edit** button to edit the Account Object.
5. Specify **Singular Label** as **Company** and **Plural Label** as **Companies** and save.
6. Publish the sandbox.
7. Create new sandbox.
8. On the Navigator, in Tools, click **User Interface Text**.
9. Click **Search and Replace** button.
10. Select all values for **Include in search**.
11. Select **Match Case and Match Complete Word or Phrase**.
12. One after another, enter values provided in the following table for the corresponding sections.

If singular or plural values aren't specified, don't enter any value.

Note: Exclude strings using the **Exclude** check box on the Text Editor page after checking the Include Remarks: User Interface Text Tab column in the table, as required. Exclude any string other than the strings in the Include Remarks: User Interface Text Tab column.

Search for (Singular Value)	Search for (Plural Value)	Replace with (Singular Value)	Replace with (Plural Value)	Include Remarks: User Interface Text Tab
Create Account	Not applicable	Create Company	Not applicable	Include the following string: <ul style="list-style-type: none"> ○ Header for Create Organization Account page.
Edit Account	Not applicable	Edit Company	Not applicable	Include the following string: <ul style="list-style-type: none"> ○ Header for the Edit Account page.
Delete Account	Not applicable	Delete Company	Not applicable	Include the following strings:

Search for (Singular Value)	Search for (Plural Value)	Replace with (Singular Value)	Replace with (Plural Value)	Include Remarks: User Interface Text Tab
				<ul style="list-style-type: none"> ○ Delete an account upon viewing the account's profile information. ○ Action on the Account Profile page that deletes the account.
Not applicable	My Accounts	Not applicable	My Companies	Include all values.
Parent Account	Not applicable	Parent Company	Not applicable	Include the following string: <ul style="list-style-type: none"> ○ Parent account assignment to an existing account creating the hierarchy tree.
Select: Account	Not applicable	Select: Company	Not applicable	Include all values.
Create Account Hierarchy	Not applicable	Create Company Hierarchy	Not applicable	Include all values.
Not applicable	Accounts	Not applicable	Companies	Include the following string: <ul style="list-style-type: none"> ○ Lists all accounts for your organization.
Account	Not applicable	Company	Not applicable	Include the following strings: <p>Note: n/a is also a value for description.</p> <ul style="list-style-type: none"> ○ Account name ○ Label of the field that specifies the name of the customer account. ○ Account for customer associated with the task.

Search for (Singular Value)	Search for (Plural Value)	Replace with (Singular Value)	Replace with (Plural Value)	Include Remarks: User Interface Text Tab
				<ul style="list-style-type: none"> ○ Label for the account name on the service request. ○ Customer account of an opportunity. ○ Search results label for Account. ○ Label displaying the name of the opportunity. ○ Indicates the ticket account. ○ Name of the account related to the activity. ○ Title for the Account tab on the Edit Opportunity page ○ Name of the account on the lead. ○ Label of the field displaying opportunity account. ○ A label on the simplified UI that provides the name of the customer type. ○ n/a

13. Click **Preview Changes** button for each change.

Wait some time for the change to take place.

14. Click **Save and Close** for each change.

15. Repeat for all values in the table.

16. After all changes are done, publish sandbox.

6 Enable the Accounts and Contacts Functional Area

Enable Functional Areas in the Sales Offering: Explained

This topic explains how to enable the Accounts and Contacts functional area in the Sales offering.

1. Sign in as an administrator or a setup user.
2. Click **Navigator > My Enterprise > Offerings**
3. On the Offerings page, select the Sales offering.
4. Click **Opt In Features**.
5. In the Opt In page, select the **Enable** check box for the Accounts and Contacts offering.
6. Click **Done**.

The Accounts and Contacts functional area of the Sales offering is enabled.

Note: Use the Edit Implementation Status option on the Accounts and Contacts functional area to track the implementation status.

7 Perform Page Composer Configurations

Perform Page Composer Configurations

Page Composer is a configuration tool using which you can configure your pages. For more information on page composer, see Oracle Applications Cloud Configuring Applications Using Application Composer guide.

Perform the following steps to hide or enable high level icons to ensure that the Springboard and Navigator display only those icons whose functionality Oracle CX Sales for Financial Services supports. Perform the following steps if you want to configure the Springboard and Navigator to hide the Lightbox icon.

Hide Lightbox Icon on Welcome Springboard

Following are the steps:

1. Sign in to Oracle CX Sales using Application Implementation Consultant role.

Note: Ensure that you're in a Sandbox environment.

2. From Navigator, select **Structure** in Tools.

Structure Tool page opens.

3. Expand **Sales**, click the **Lightbox** object.
4. On the Edit page, change the value of **Show on Navigator** field to **No**.
5. Click **Save and Close**.

Hide Dashboard Icon on Welcome Springboard

Following are the steps to hide the Dashboard icon on Welcome Springboard.

1. Sign in to Oracle CX Sales using Application Implementation Consultant role.
2. Create and activate a sandbox.
3. From Navigator, click **Structure** in **Tools**.

Structure page opens.

4. Expand **Sales**, click **Dashboard**.

Edit Page Entry: Dashboard page opens.

5. Set the value of **Show on Welcome Springboard** to **No**, if the value isn't **No**.
6. Click **Save and Close**.

Enable Households Icon on Navigator and Welcome Springboard

Households isn't available as a default entity in Oracle CX Sales for Financial Services. You must enable it for usage in Oracle CX Sales for Financial Services.

Perform the following steps to enable the Households icon on Navigator and Welcome Springboard:

1. Sign in to Oracle CX Sales using Sales Administrator role.
2. Create and activate a sandbox.
3. From Navigator, click **Structure** in **Tools**.

Structure page opens.

4. Expand **Sales**, click **Households**.

Edit Page Entry: Households page opens.

5. Set the value of **Show on Navigator** to **Yes**.
6. Set the value of **Show on Welcome Springboard** to **Yes**.
7. Click **Save and Close**.

Hide Companies Icon on Navigator and Welcome Springboard for Retail Banking

Companies is available as a default entity in Oracle CX Sales for Financial Services. If you intend to, you can hide it for Retail Banker and Retail Bank Manager in Oracle CX Sales for Financial Services.

Perform the following steps to hide the Companies icon on Navigator and Welcome Springboard:

1. Sign in to Oracle CX Sales using Sales Administrator role.
2. Create and activate a sandbox.
3. From Navigator, click **Structure** in **Tools**.

Structure page opens.

4. Expand **Sales**, click **Companies**.

Edit Page Entry: Companies page opens.

5. Set the value of **Show on Navigator** to **EL Expression**.
6. Edit the expression in the expression language as follows:

```
Add: (!securityContext.userInRole['AFS_RETAIL_BANKER']) and (!  
securityContext.userInRole['AFS_RETAIL_BANK_MANAGER_JOB'])
```

For example, if `#{{{(Profile.values.ZCA_ALLOW_CLASSIC_INTERFACE ne 'Y') or (Profile.values.FND_CLASSIC_INTERFACE eq 'N')}}}` is the expression, change it to

```
#{{{(Profile.values.ZCA_ALLOW_CLASSIC_INTERFACE ne 'Y') or (Profile.values.FND_CLASSIC_INTERFACE
```



```
eq 'N')) and (!securityContext.userInRole['AFS_RETAIL_BANKER']) and (!  
securityContext.userInRole['AFS_RETAIL_BANK_MANAGER_JOB'])}
```

Note: Ensure that the initial expression is within a single parentheses and then add the two new expressions using **and** operator. For example, (entire_initial_expression) and (retail_banker_expression) and (retail_bank_manager_expression)

7. Click **Validate** and click **OK**.
8. Click **Save and Close**.
9. Repeat steps 4 to 10 for **Services** folder also in case the Service Offering is enabled.

8 Configure Reports and Analytics

Configure KPI Dashboard for Retail Banking

You must configure Key Performance Indicator (KPI) dashboard to work with financial services features.

Configure Reports for Retail Banker

You must configure reports for the Retail Banker role to ensure that the retail banker can work with the various reports of retail banking.

To configure reports:

1. Sign in to Oracle CX Sales using Sales Administrator role.
2. Click **Edit Pages** from the Settings and Actions menu.
 - Note:** To perform Page Composer configurations, you require Retail Banker Job role.
3. Select **Job Role**.
4. Select **Retail Banker** Job role from the drop-down list.
5. Click the **Sales Infolets** pagination control on the springboard.
6. Select **Delete** option in **Actions** for each infolet to delete any existing infolets.
7. Click the **Infolet Repository** icon and select **Create Infolet** option.

Choose the following options:

- o Infolet Title: According to the following table.
 - o Dimension: 1 x 1
 - o Back View: No
 - o Expanded View: No
8. Click **Save and Close**.
 9. Click **Add Content** button and select infolet according to the following table.
 10. Click **Link Detailed Report** option in **Actions**.
 11. Click **Add Content** button and select detailed report according to the following table.

Title	Detailed Report	Infolet
Actuals vs Quota	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Dashboards/Actuals vs Quota Dashboard for Retail Bank Manager	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Actuals vs Quota Tile for Retail Bank Manager

Title	Detailed Report	Infolet
Top Loans	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Dashboards/Top Loans Retail Manager Dashboard	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Top Loans Tile for Retail Manager
Loan Pipeline	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Dashboards/Retail Bank Manager Loan Pipeline Dashboard	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/ KPI Dashboard/Retail Bank Manager Pipeline Tile
Push Applications	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/ KPI Dashboard/Dashboards/Push Application Dashboard for Retail Bank Manager	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Push Applications Tile for Retail Bank Manager
Refinance Deals	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Dashboards/Refinance Deals Manager Dashboard	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Refinance Deals Tile for Retail Manager
Top 5 Products	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Dashboards/Top 5 Products based on Open Opportunity Dashboard	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Top 5 Products based on Open Opportunity Tile
Top 5 Products	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Dashboards/Top 5 Products based on Open Leads Dashboard	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Top 5 Products based on Open Lead Tile

Configure Reports for Retail Bank Manager

You must configure reports for the Retail Bank Manager role to ensure that the retail bank manager can work with the various reports of retail banking.

To configure reports:

1. Sign in to Oracle CX Sales using Sales Administrator role.
2. Click **Edit Pages** from the Settings and Actions menu.

Note: To perform Page Composer configurations, you require Retail Bank Manager Job role.

3. Select **Job Role**.

4. Select **Retail Bank Manager** Job role from the drop-down list.
5. Click the **Sales Infolets** pagination control on the springboard.
6. Select **Delete** option in **Actions** for each infolet to delete any existing infolets.
7. Click the **Infolet Repository** icon and select **Create Infolet** option.

Choose the following options:

- o Infolet Title: According to the following table.
 - o Dimension: 1 x 1
 - o Back View: No
 - o Expanded View: No
8. Click **Save and Close**.
 9. Click **Add Content** button and select infolet according to the following table.
 10. Click **Link Detailed Report** option in **Actions**.
 11. Click **Add Content** button and select detailed report according to the following table.

The following table contains details of various reports for retail bank manager.

Title	Detailed Report	Infolet
Actuals vs Quota	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Dashboards/Actuals vs Quota Dashboard for Retail Bank Manager	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Actuals vs Quota Tile for Retail Bank Manager
Top Loans	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Dashboards/Top Loans Retail Manager Dashboard	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Top Loans Tile for Retail Manager
Loan Pipeline	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Dashboards/Retail Bank Manager Loan Pipeline Dashboard	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/ KPI Dashboard/Retail Bank Manager Pipeline Tile
Push Applications	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/ KPI Dashboard/Dashboards/Push Application Dashboard for Retail Bank Manager	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Push Applications Tile for Retail Bank Manager
Refinance Deals	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Dashboards/Refinance Deals Manager Dashboard	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Refinance Deals Tile for Retail Manager
Rep Performance	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Dashboards/Rep Performance Manager Dashboard	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Rep Performance Tile for Retail Manager

Title	Detailed Report	Infolet
	Extension/orafs/Retail Banking/KPI Dashboard/Dashboards/Rep Performance	Extension/orafs/Retail Banking/KPI Dashboard/Rep Performance Tile Report
Top 5 Products	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Dashboards/Top 5 Products based on Open Opportunity Dashboard	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Top 5 Products based on Open Opportunity Tile
Top 5 Products	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Dashboards/Top 5 Products based on Open Leads Dashboard	Reports and Analytics/ BIPresentationServer/Shared Folders/ Extension/orafs/Retail Banking/KPI Dashboard/Top 5 Products based on Open Lead Tile

Configure Reports for Commercial Banker and Commercial Bank Manager

You must configure reports for the Commercial Banker and Commercial Bank Manager to ensure that they can work with the various reports of commercial banking.

To configure reports:

1. Sign in to Oracle CX Sales using Sales Administrator role.
2. Click **Edit Pages** from the Settings and Actions menu.

Note: To perform Page Composer configurations, you require a role for which configuration is done. In this case, Commercial Banker or Commercial Bank Manager role is required.

3. Select job role for which dashboard must be configured.
4. Click the **Sales Infolets** pagination control on the springboard.
5. Select **Delete** option in **Actions** for each infolet to delete any existing infolets.
6. Click the **Infolet Repository** icon and select **Create Infolet** option.

Choose the following options:

- o Infolet Title: According to the following table.
- o Dimension: According to the following table.
- o Back View: No
- o Expanded View: No

7. Click **Save and Close**.
8. Click **Add Content** button and select infolet according to the following table.
9. Click **Link Detailed Report** option in **Actions**.
10. Click **Add Content** button and select detailed report according to the following table.
11. Repeat steps 1 to 10 until all the required reports corresponding to a role are configured.

Roles	Title	Dimension	Detailed Report	Infolet
Commercial Banker and Commercial Bank Manager	Actuals vs Quota	1 x 1	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Dashboards/Actuals vs Quota Dashboard	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Infolet Tiles/ Actuals vs Quota Tile
Commercial Banker and Commercial Bank Manager	Loan Pipeline	1 x 1	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Dashboards/Loan Pipeline Dashboard	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Infolet Tiles/Loan Pipeline Tile
Commercial Banker and Commercial Bank Manager	Loan Performance Year To Date	2 x 1	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Dashboards/Loan Performance YTD Dashboard	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Infolet Tiles/Loan Performance YTD Tile
Commercial Banker and Commercial Bank Manager	Top Loans	1 x 1	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Dashboards/Top Loans Dashboard	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Infolet Tiles/Top Loans Tile
Commercial Banker and Commercial Bank Manager	Loans Underwritten Year to Date	2 x 1	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Dashboards/Loans Underwritten YTD Dashboard	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Infolet Tiles/Loans Underwritten YTD Tile
Commercial Banker and Commercial Bank Manager	Push Applications	1 x 1	Reports and Analytics/ BIPresentationServer/	Reports and Analytics/ BIPresentationServer/

Roles	Title	Dimension	Detailed Report	Infolet
			Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Dashboards/Push Application Dashboard	Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Infolet Tiles/Push Applications Tile
Commercial Banker and Commercial Bank Manager	Top 5 Products for Opportunities	2 x 1	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Dashboards/Top 5 Products Dashboard based on Open Opportunity	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Infolet Tiles/Top 5 Products based on Open Opportunity Tile
Commercial Banker and Commercial Bank Manager	Top 5 Products for Leads	2 x 1	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Dashboards/Top 5 Products Dashboard based on Open Leads	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Infolet Tiles/Top 5 Products based on Open Lead Tile
Commercial Bank Manager	Rep Performance	1 x 1	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Dashboards/Rep Performance Dashboard	Reports and Analytics/ BIPresentationServer/ Shared Folders/ Extension/orafs/ Commercial Banking/ KPI Dashboards/ Infolet Tiles/Rep Performance Tile

Change Filters for the Loan Pipeline Report

Loan Pipeline reports are closely associated with the configured sales method values such as Retail Banking for Retail Banker or Retail Bank Manager and Commercial Loan or Equipment Finance for Commercial Banker or Commercial Bank Manager.

Details are available in the Configuring Sales Processes topic in the Getting Started with Financial Services Implementation guide. Following are the steps to add additional sales methods or make changes in existing filters:

Remove Existing Filters

Following are the steps to remove existing filters:

1. Sign into Oracle Business Intelligence server using Administrator role.
2. Navigate to the reports based on the details in the following table.
3. Create a copy of reports and infolets.
4. Edit the reports and infolets created.
5. Select **Criteria** tab.
6. Delete filters mentioned in the following table.
7. Click **Save Analysis**.

User	Detailed Report	Infolet	Filter
Retail Banker Retail Bank Manager	/Shared Folders/Extension/orafs/Retail Banking/KPI Dashboard/Retail Bank Manager Pipeline	/Shared Folders/Extension/orafs/Retail Banking/KPI Dashboard/Retail Bank Manager Pipeline Tile	Pipeline Filter
Commercial Banker Commercial Bank Manager	/Shared Folders/Extension/orafs/Commercial Banking/KPI Dashboards/Detail Reports/Loan Pipeline Detail	/Shared Folders/Extension/orafs/Commercial Banking/KPI Dashboards/Infolet Tiles/Loan Pipeline Tile	Commercial Loans Sales Method Filter

Create New Filters

After removing filters that restrict use of commercial loans and equipment finance sales methods for commercial banker or commercial bank manager and retail banking sales method for retail banker or retail bank manager, you can create and add any filter based on your requirement.

Following are the steps to create new filters:

1. Sign into Oracle Business Intelligence server using Administrator role.
2. Navigate to the reports and infolets mentioned in the table in the Remove Existing Filters section in this topic.
3. Create a copy of the reports and infolets.
4. Edit the reports and infolets created.
5. Select **Criteria** tab.
6. Create **Filter**.
7. Click **Save Analysis**.

After the required filters are applied, perform the steps in topics Configuring Reports for Retail Bank Manager and Configuring Reports for Commercial Banker and Commercial Bank Manager in the Getting Started with Financial Services Implementation guide for the newly created reports and infolets.

9 Configure Sales Organization

Configure Sales Organization as the Inventory Organization

Intelligent Advisor recommends that the product must be from the same organization as the one to which opportunity belongs. To implement this recommendation, you must configure item organization to be same as the sales organization.

For configuring sales organization as the inventory organization in Oracle CX Sales for Financial Services, business unit and internal organization for BU (created with same name as BU) must be available for your sales organization. The business unit and internal organization must already be set up and available at Oracle CX Sales based on the information that you provided after signing in to Oracle CX Sales.

Following are the steps to configure your sales organization as the inventory organization:

1. Sign in to Oracle CX Sales using Application Implementation Consultant role.
2. In the Setup and Maintenance work area, go to the following:
 - o Offering: Sales
 - o Functional Area: Company Profile
 - o Task: Manage Common CRM Business Unit Profile Options
3. Click **HZ_ENABLE_MULTIPLE_BU_CRM** link.
4. In the **HZ_ENABLE_MULTIPLE_BU_CRM: Profile Values** section, select **No** as value for **Site Level** if your organization doesn't support multiple business units. Select **Yes** if your organization needs multiple business units for setup.
5. Click **Save and Close**.
6. Click **HZ_DEFAULT_BU_CRM** link.
7. If profile values are displayed, then in the **HZ_DEFAULT_BU_CRM: Profile Values** section, set the profile value with the default business unit that must be used in the application at site level. You can assign business units at user level also while setting up organization hierarchies.
8. Click **Save and Close**.
9. If a profile value isn't displayed, then create new profile value in the **HZ_DEFAULT_BU_CRM: Profile Values** section or the **HZ_ENABLE_MULTIPLE_BU_CRM: Profile Values** section. Select **New** in **Actions** drop-down list.
10. Click **Done** on the Manage Common CRM Business Unit Profile Options page.

Manage Item Organizations

1. Search for **Manage Item Organizations** task.
2. In the Search Results, click **Manage Item Organizations** link.
Manage Item Organizations page opens.
3. Within Search, for the **Organization Name** field, enter the same business unit name that you selected for profile value in the Manage Common CRM Business Unit Profile Options section. Click **Search**.
4. If the search results in the display of the organization and organization name details, click **Done** on the Manage Item Organizations page.

5. If the search doesn't result in the display of the organization and organization name details, click the **Create** icon on the Manage Item Organizations page to create the new item organization.

Create Item Organization page opens.

6. On Create Item Organization page, select the **Select an existing organization** check box.
7. Within Search section, in the **Name** field, enter the same business unit name that you entered for profile value in the Manage Common CRM Business Unit Profile Options section. Click **Search**.
8. Click the **Select Organization** icon corresponding to the business unit name displayed in the Search Results.

Create Item Organization page opens.

9. Enter **Organization** and **Name** details. Click **Next**.

Manage Item Organization Parameters page opens.

10. For **Item Master Organization** field, enter the same business unit name that you entered for profile value in the Manage Common CRM Business Unit Profile Options section.
11. Enter the **Starting Revision** field value as **1**. Click **Save and Close**.

Manage Item Organizations page opens.

12. Click **Done**.

Manage Administrator Profile Values

1. Search for **Manage Administrator Profile Values** task.
2. In the Search Results, click **Manage Administrator Profile Values** link.

Manage Administrator Profile Values page opens.

3. For **Profile Option Code** field, enter value as **QSC_SALES_PRODUCTS_INVENTORY_ORG_ID**. Click **Search**.
4. If a profile value is displayed, ensure that it's same as the business unit name that you entered for profile value in the Manage Common CRM Business Unit Profile Options section. Click **Save and Close**.
5. If a profile value isn't displayed, then create new profile value for the Profile Option: Profile Values section. Select **New** for **Actions** drop-down list.
6. For the **Profile Level** drop-down list, select **Site**.
7. For **Profile Value**, select the same value as the business unit name that you selected for profile value in the Manage Common CRM Business Unit Profile Options section. Click **Save and Close**.
8. Click **Done** on the Search page.

10 Set Up Intelligent Advisor

Set Up Intelligent Advisor Interview

You must set up Intelligent Advisor interview to configure policy model deployment, products, and attributes required for working with financial services.

Prepare Intelligent Advisor Interviews for Financial Services

Seven Intelligent Advisor interview projects are provided with Oracle CX Sales for Financial Services. These projects are designed to provide decision making advice as part of the Needs Analysis feature. The feature can be changed and maintained to meet the needs of your organization. Using Oracle Policy Modeling, prepare these seven projects to work with your specific Oracle CX Sales implementation.

Depending on the version that you require, you must open either the `Financial_Services_R13_1805_CPB20180713` compressed file or the `Financial_Services_R13_1802_CPB20180713`. Both `Financial_Services_R13_1805_CPB20180713` compressed file and `Financial_Services_R13_1802_CPB20180713` compressed file are available at Collaterals for Oracle CX Sales for Financial Services (My Oracle Support Document ID 2077119.1). `Financial_Services_R13_1805_CPB20180713` compressed file contains a directory named `R13_1805`. `Financial_Services_R13_1802_CPB20180713` compressed file contains a directory named `R13_1802`. The `R13_1805` directory contains seven Intelligent Advisor sample interviews named `R13_Opportunity Interview`, `R13_Lead Interview`, `R13_Contact Needs Analysis`, `R13_Household Needs Analysis`, `R13 Commercial Banking Account Interview`, `R13 Commercial Banking Opportunity Interview`, and `R13 Commercial Banking Lead Interview`. The `R13_1802` directory contains seven Intelligent Advisor sample interviews named `R13_Opportunity Interview`, `R13_Lead Interview`, `R13_Contact Needs Analysis`, `R13_Household Needs Analysis`, `R13 Commercial Banking Account Interview`, `R13 Commercial Banking Opportunity Interview`, and `R13 Commercial Banking Lead Interview`.

You must perform the following steps for each of the interviews.

1. You must open Interview folder.

You can see a file of the type XPRJ.

2. Double-click and open the file.

The file opens in Oracle Policy Modeling.

3. Navigate to the Oracle Policy Modeling Data tab and click **Mapping Settings**.
4. Next to **Connection**, click the **Change Hyperlink** on the Mapping Setting dialog box and provide Intelligent Advisor Hub URL, Hub User name, and Password. Provide the information and sign in to the hub.
5. Select the connection created on Intelligent Advisor Hub and click **OK**. For more information on creating the connection, see the topic Integrate Intelligent Advisor in the Oracle CX Sales Implementing Sales guide.
6. Go to Interview tab in Oracle Policy Modeling and navigate to **Confirmation** in the pane. Click **Submit**.
7. Click **Submit and Redirect** on the drop-down list. Note that the check box corresponding to the **Submit and Redirect** option is already selected.
8. For Opportunity interview, copy the following URL and paste it in the Redirect URL box.

```
https://<crm_host_name>/crmUI/faces/CrmFusionHome?
isFuseTF=Y&tabToOpen=MOO_OPPTYMGMTOPPORTUNITIES_CRM&cardToOpen=MOO_OPPTYMGMTOPPORTUNITIE
%OpTyld%
```

The `crm_host_name` can be obtained from the Oracle CX Sales URL, for example, if **https://fuscdrmsmc318-fa-ext.oracle.com/crmUI/faces/** is the Oracle CX Sales URL, the `crm_host_name` will be **fuscdrmsmc318-fa-ext.oracle.com** and so in the preceding example, the URL will be **https://fuscdrmsmc318-fa-ext.oracle.com/crmUI/faces/CrmFusionHome?isFuseTF=Y&tabToOpen=MOO_OPPTYMGMTOPPORTUNITIES_CRM&cardToOpen=MOO_OPPTYMGMTOPPORTU%Optyld%**

9. Click **OK**.
10. Go to Rules tab, browse to the **Interview Rules** folder in the **Rules** folder and double-click the **Screen display rules.docx** rule document to open it in Microsoft Word.
11. Navigate to the Cancel Button section. In the **cancel button URL =** rule, replace the host name with the value of `crm_host_name` obtained from step 8. Assign the host name to `Env_Url` variable in the rule document, for example, **fuscdrmsmc318-fa-ext.oracle.com**
12. Click **Validate** button on the Policy Modeling word toolbar.
13. Save and close the rule document.
14. Repeat these steps for the **R13 Lead Interview**. For step 8, use the following URL:

https://<crm_host_name>/crmUI/faces/CrmFusionHome?
isFuseTF=Y&cardToOpen=MKL_LEADS&TF_subTabName=SUMMARY&TF_LeadId=%LeadId%

The `crm_host_name` can be obtained from the Oracle CX Sales URL, for example, if **https://fuscdrmsmc318-fa-ext.oracle.com/crmUI/faces/CrmFusionHome** is the Oracle CX Sales URL, the `crm_host_name` will be **fuscdrmsmc318-fa-ext.oracle.com** and so in the above example, the URL will be **https://fuscdrmsmc318-fa-ext.oracle.com/crmUI/faces/CrmFusionHome?isFuseTF=Y&cardToOpen=MKL_LEADS_CARD&tabToOpen=MKL_LEADS&TF_subTabName=SUMMARY&TF_LeadId=%LeadId%**

15. Click **OK**.
 - a. Go to Rules tab, browse to the **Interview Rules** folder in the **Rules** folder and double-click the **Screen display rules.docx** rule document to open it in Microsoft Word.
 - b. Navigate to the Cancel Button section. In the **cancel button URL =** rule, replace the host name with the value of `crm_host_name` obtained from step 8. Assign the host name to `Env_Url` variable in the rule document, for example, **fuscdrmsmc318-fa-ext.oracle.com**
 - c. Click **Validate** button on the Policy Modeling word toolbar.
 - d. Save and close the rule document.
16. Repeat these steps for **R13 Contact Interview, R13 Household Interview, R13 Account Interview, R13 Opportunity Commercial Banking Interview, Of R13 Lead Commercial Banking Interview**:
 - a. Go to Rules tab, browse to the **Interview Rules** folder in the **Rules** folder and double-click the **Screen display rules.docx** rule document to open it in Microsoft Word.
 - b. Navigate to the Cancel Button section. In the **cancel button URL =** rule, replace the host name with the value of `crm_host_name` obtained from step 8. Assign the host name to `Env_Url` variable in the rule document, for example, if **https://fuscdrmsmc318-fa-ext.oracle.com/crmUI/faces/CrmFusionHome** is the Oracle CX Sales URL, the `crm_host_name` will be **fuscdrmsmc318-fa-ext.oracle.com** and so in the above example, the URL will be **https://fuscdrmsmc318-fa-ext.oracle.com**
 - c. Click **Validate** button on the Policy Modeling word toolbar.
 - d. Save and close the rule document.

Deploy Intelligent Advisor Interviews for Financial Services

After preparing the six Financial Services interviews, you must deploy them (See Deploy and activate a project section of the Project Administrator guide listed in the Related Topics section in this topic.) for use with the Needs Analysis feature of Oracle CX Sales for Financial Services.

Following are the steps:

1. Click Project tab on Oracle Policy Modeling and click **Deploy Snapshot**.
2. You must provide sign in details such as Hub, User name, and Password information on Intelligent Advisor Hub and change the Deployment Name as specified in the following table:

Interview Name	Deployment Name
Opportunity Interview	R13 Opportunity Interview
Lead interview	R13 Lead Interview
Contact Interview	R13 Contact Interview
Household Interview	R13 Household Interview
Opportunity Commercial Banking Interview	R13 Opportunity Commercial Banking Interview
Lead Commercial Banking Interview	R13 Lead Commercial Banking Interview
Account Commercial Banking Interview	R13 Account Commercial Banking Interview

The interview is deployed on Intelligent Advisor Hub.

3. Navigate to Deployments tab on Intelligent Advisor Hub to access the interview.
4. Follow the steps from 2 to 13 of the Preparing Intelligent Advisor Interviews for Financial Services section, steps 1 and 2 of the Deploying Intelligent Advisor Interviews for Financial Services section.
5. Sign in to Intelligent Advisor Hub using OPA HUB user name and password. You must navigate to Deployments tab and search for the interview that was deployed in step 2 of the Deploying Intelligent Advisor Interviews for Financial Services section with the deployment names provided in the table.
6. Sign in to Oracle CX Sales using Application Implementation Consultant role.
7. In the Setup and Maintenance work area, go to the following:
 - o Functional Area: Application Extensions
 - o Task: Manage Setup Content
8. Click **Manage Third Party Applications** in Topology Definition section.
9. Add third-party applications as defined in the following table. The full URL is the deployment name obtained for each of these interviews in step 5.

Application Name	Full URL	Partner Name
OPA_Opportunity_Interview	<R13 Opportunity Interview URL>	OPA
OPA_Lead_Interview	<R13 Lead Interview URL>	OPA
OPA_Contact_Interview	<R13 Contact Interview URL>	OPA
OPA_Household_Interview	<R13 Household Interview URL>	OPA
OPA_Opportunity_Com_Interview	<R13 Opportunity Commercial Banking Interview URL>	OPA
OPA_Lead_Com_Interview	<R13 Lead Commercial Banking Interview URL>	OPA
OPA_Account_Interview	<R13 Account Commercial Banking Interview URL>	OPA

To configure needs analysis object functions in opportunity:

1. Navigate to Application Composer and navigate to Sales Application.
2. Open **Opportunity Standard Object** and navigate to **Server Scripts** and select **Object Function**.
3. Click **Actions** and select **Add** to add new object function.
4. In the Function Body, add the following Groovy Script.

```
def jwtToken=new oracle.apps.fnd.applcore.common.SecuredTokenBean().getTrustToken();
if(__ORAFS__OpportunityType_c == null)
{
return
oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('OPA_Opportunity_Interview')+"?
SurveyCaseId="+OptyId+"&jwt="+jwtToken+""}
else if(nvl(__ORAFS__OpportunityType_c,"").equalsIgnoreCase("ORA_AFS_HOME_EQUITY"))
{
return
oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('OPA_Opportunity_Interview')+"?
SurveyCaseId="+OptyId+"&seedData=loan_purpose%3dHome%20Equity&jwt="+jwtToken+""}
else if(nvl(__ORAFS__OpportunityType_c,"").equalsIgnoreCase("ORA_AFS_HOME_PURCHASE"))
{
return
oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('OPA_Opportunity_Interview')+"?
SurveyCaseId="+OptyId+"&seedData=loan_purpose%3dHome%20Purchase&jwt="+jwtToken+""}
else if(nvl(__ORAFS__OpportunityType_c,"").equalsIgnoreCase("ORA_AFS_HOME_REFINANCE"))
{
return
oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('OPA_Opportunity_Interview')+"?
SurveyCaseId="+OptyId+"&seedData=loan_purpose%3dHome%20Refinance&jwt="+jwtToken+""}
else if(nvl(__ORAFS__OpportunityType_c,"").equalsIgnoreCase("ORA_AFS_COMMERCIAL_LOAN"))
{
```



```

return
  oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('OPA_Opportunity_Com_Interview')+"?
  SurveyCaseId="+OptyId+"&seedData=loan_purpose%3dCommercial%20Loan&jwt="+jwtToken+"
}
else if(nvl(__ORAFS__OpportunityType_c,"").equalsIgnoreCase("ORA_AFS_EQUIPMENT_FINANCE"))
{
return
  oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('OPA_Opportunity_Com_Interview')+"?
  SurveyCaseId="+OptyId+"&seedData=loan_purpose%3dEquipment%20Finance&jwt="+jwtToken+"
}

else
{
return ""
}

```

5. Enter the **Function Name** as **getOPAUrl** and select **Return Type** as **String**.
6. Save and close the object function.

To configure needs analysis object functions in lead:

1. Navigate to Application Composer and navigate to Sales Application.
2. Open **Sales Lead Standard Object** and navigate to **Server Scripts** and select **Object Function**.
3. Click **Actions** and select **Add** to add new object function.
4. In the Function Body, add the following Groovy Script.

```

def jwtToken=new oracle.apps.fnd.applcore.common.SecuredTokenBean().getTrustToken();
if(__ORAFS__LeadType_c == null)
{
return
  oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('OPA_Lead_Interview')+"?
  SurveyCaseId="+LeadId+"&jwt="+jwtToken+"
}
else if(nvl(__ORAFS__LeadType_c,"").equalsIgnoreCase("ORA_AFS_LEAD_HOME_EQUITY"))
{
return
  oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('OPA_Lead_Interview')+"?
  SurveyCaseId="+LeadId+"&seedData=loan_purpose%3dHome%20Equity&wt="+jwtToken+"
}
else if(nvl(__ORAFS__LeadType_c,"").equalsIgnoreCase("ORA_AFS_LEAD_HOME_PURCHASE"))
{
return
  oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('OPA_Lead_Interview')+"?
  SurveyCaseId="+LeadId+"&seedData=loan_purpose%3dHome%20Purchase&jwt="+jwtToken+"
}
else if(nvl(__ORAFS__LeadType_c,"").equalsIgnoreCase("ORA_AFS_LEAD_HOME_REFINANCE"))
{
return
  oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('OPA_Lead_Interview')+"?
  SurveyCaseId="+LeadId+"&seedData=loan_purpose%3dHome%20Refinance&jwt="+jwtToken+"
}

else if(nvl(__ORAFS__LeadType_c,"").equalsIgnoreCase("ORA_AFS_LEAD_COMMERCIAL_LOAN")){

return
  oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('OPA_Lead_Com_Interview')+"?
  SurveyCaseId="+LeadId+"&seedData=loan_purpose%3dCommercial%20Loan&jwt="+jwtToken+"
}
else if(nvl(__ORAFS__LeadType_c,"").equalsIgnoreCase("ORA_AFS_LEAD_EQUIPMENT_FINANCE"))
{
return
  oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('OPA_Lead_Com_Interview')+"?
  SurveyCaseId="+LeadId+"&seedData=loan_purpose%3dEquipment%20Finance&jwt="+jwtToken+"
}
}

```

```
else
{
return ""
}
```

5. Enter the **Function Name** as **getLeadOPAUrI** and select **Return Type** as **String**.
6. Save and close the object function.

To configure needs analysis object functions in contact:

1. Navigate to Application Composer and navigate to Sales Application.
2. Open **Contact Standard Object** and navigate to **Server Scripts** and select **Object Function**.
3. Click **Actions** and select **Add** to add new object function.
4. In the Function Body, add the following Groovy Script.

```
def jwtToken=new oracle.apps.fnd.applcore.common.SecuredTokenBean().getTrustToken();

return
oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('OPA_Contact_Interview')+"?
SurveyCaseId="+PartyId+"&jwt="+jwtToken+""
```

5. Enter the **Function Name** as **getContactOPAUrI** and select **Return Type** as **String**.
6. Save and close the object function.

To configure needs analysis object functions in household:

1. Navigate to Application Composer and navigate to Sales Application.
2. Open **Household Standard Object** and navigate to **Server Scripts** and select **Object Function**.
3. Click **Actions** and select **Add** to add new object function.
4. In the Function Body, add the following Groovy Script.

```
def jwtToken=new oracle.apps.fnd.applcore.common.SecuredTokenBean().getTrustToken();

return
oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('OPA_Household_Interview')+"?
SurveyCaseId="+PartyId+"&jwt="+jwtToken+""
```

5. Enter the **Function Name** as **getHouseholdOPAUrI** and select **Return Type** as **String**.
6. Save and close the object function.

To configure need analysis object functions in account:

1. Navigate to Application Composer and navigate to Sales Application.
2. Open **Account/Company Standard Object** and navigate to **Server Scripts** and select **Object Function**.
3. Click **Actions** and select **Add** to add new object function.
4. In the Function Body, add the following Groovy Script.

```
def jwtToken=new oracle.apps.fnd.applcore.common.SecuredTokenBean().getTrustToken();

return
oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('OPA_Account_Interview')+"?
SurveyCaseId="+PartyId+"&jwt="+jwtToken+""
```

5. Enter the **Function Name** as **getAccountOPAUrI** and select **Return Type** as **String**.
6. Save and close the object function.

Related Topics

11 Configure Open Authorization

Configure Open Authorization for Intelligent Advisor Integration

You must configure the open authorization (OAUTH) for Intelligent Advisor integration to perform opportunity need analysis in Oracle CX Sales for Financial Services.

This configuration helps the Oracle CX Sales user to authenticate the Intelligent Advisor connector operation instead of using the sales_admin user role as default.

Note: **Username** on the Connection page must be **sales_admin** as the default value to load the metadata required for interview.

To configure OAUTH in Intelligent Advisor connector:

1. Sign in to Intelligent Advisor Hub using Administrator role.
2. Navigate to **Connections**.
3. Open the Intelligent Advisor connection that you created for Opportunity Needs Analysis.
4. Select **Metadata only** from the drop-down list for **Applies to** field.
5. Enable the **Requires OAUTH bearer token in HTTP header on Load and Save actions** check box.
6. Enter the **URL Parameter** value as **jwt**.

12 Configure Item Types

Configure Item Types Required for Needs Analysis Interviews

Product Type is a field in the Product Object for classifying different products. This field is also used in the recommendation rules for Intelligent Advisor ready-to-use interviews.

You need to create eight item types for ready-to-use interviews. These are Home Loan t1, Home Loan t2, Equity Line t1, and Equity Line t2, CCL Type 1, CCL Type 2, New Equip Fin, and Old Equip Fin. These eight item types are required for ready-to-use Intelligent Advisor Needs Analysis to work.

1. Sign in to Oracle CX Sales using Sales Administrator role.
2. In the Setup and Maintenance work area, go to the following:
 - o Functional Area: Application Extensions
 - o Task: Manage Standard Lookups
3. Search for **QSC_SALES_PRODUCT_TYPE** in **Lookup Type**.
4. In the Search Results, click the **QSC_SALES_PRODUCT_TYPE** lookup type.
5. In the Lookup Codes section, sales administrator can configure lookup codes such as Home Loan t1, Home Loan t2, Equity Line t1, and Equity Line t2, CCL Type 1, CCL Type 2, New Equip Fin and Old Equip Fin corresponding to product types Home Loan t1, Home Loan t2, Equity Line t1, and Equity Line t2, CCL Type 1, CCL Type 2, New Equip Fin, and Old Equip Fin respectively. Apart from these eight product types, any user-defined product type can also be configured.
6. While creating a product, you can specify the product type using the **Product Type** field on the Create Product page or Edit Product page.
7. In the Lookup Codes section, click **New** to enter user-defined product types.
8. Click **Save**.

13 Set Up Profile Option

Set Up Profile Option for Creating Customer Relationship Management Product

When you create a customer relationship management product in Oracle CX Sales, an item is automatically created in the product information management.

The item organization for product information management item is selected using **QSC_SALES_PRODUCTS_INVENTORY_ORG_ID** profile option. You can set the profile option at site or user level through the following steps:

1. Sign in to Oracle CX Sales using Sales Administrator role.
2. In the Setup and Maintenance work area, go to the following:
 - o Functional Area: Application Extensions
 - o Task: Manage Administrator Profile Value
3. Search for **QSC_SALES_PRODUCTS_INVENTORY_ORG_ID** profile option.
4. Add profile values at site or user level. You can select the item organization in which you want to create items.

14 Configure File Import and Export

Configure File Import and Export

You must configure file import and export setup for importing and exporting files in Oracle CX Sales for Financial Services.

Note: You must not be within a sandbox for this action. The user performing the action must use SALES_ADMINISTRATOR and CUSTOM OBJECT ADMINISTRATION roles.

To perform file import and export:

1. Navigate to Application Composer.
2. Select **Import and Export** for the Common Setup.
3. On the Generate Import and Export Artifacts page, click **Generate**. If the artifact generation is successful, the following message is displayed: The artifacts required for the importing and exporting of extensible objects were created for all extensions.

15 Configure Sales Processes

Configure Sales Processes

You must configure sales processes for different tasks and user roles for configuring sales processes in Oracle CX for Financial Services.

To configure sales processes:

1. Sign in to Oracle CX Sales using Administrator role.
2. In the Setup and Maintenance work area, go to the following:
 - o Offering: Sales
 - o Functional Area: Opportunities
 - o Task: Manage Sales Methods and Sales Stages
3. Click **Create** button to create the new Sales Methods and their attached Sales Stages as mentioned in the following table.
4. In the Setup and Maintenance work area, go to the following:
 - o Offering: Sales
 - o Functional Area: Opportunities
 - o Task: Manage Opportunity Profile Options
5. Enter **Profile Option Code** as **MOO_DEFAULT_SALES_METHOD** and click **Search**.
6. In MOO_DEFAULT_SALES_METHOD: Profile Values tab, click **Add** button.
7. Select **Profile Level** as **User**, select the retail banking and commercial banking users with whom you want to associate the sales methods that you create. Select **Profile Value** as the default **Sales Method**. As the default, **Retail Banking** is the **Retail Banking Sales Stage** and **Commercial Loans** is the **Commercial Banking Sales Stage**.
8. Click **Save and Close**.

As the default sales method is a user level setting, the preceding steps must be done for each user of retail banking and commercial banking to get the default sales methods.

Note that at least one Site Level Profile Value is required for the Profile Option. If the profile value is missing, it must be created. The following table provides an example of sales process with all the required steps.

Sales Method	Description	Sales Stage Name	Phase	Status	Order	Quota Factor	Win Probability	Duration	Stalled Deal Limit
Commercial Loans	Not applicable	Loan purpose evaluation	A	Open	1	3.5	10	5	800
Commercial Loans	Not applicable	Company Visit Completed	B	Open	2	3	20	4	800

Sales Method	Description	Sales Stage Name	Phase	Status	Order	Quota Factor	Win Probability	Duration	Stalled Deal Limit
Commercial Loans	Not applicable	Credit Check	B	Open	3	2.8	30	2	800
Commercial Loans	Not applicable	Research Analysis	B	Open	4	2.5	40	4	800
Commercial Loans	Not applicable	Deal Structured	B	Open	5	2.2	50	2	800
Commercial Loans	Not applicable	Draft Deal generated	B	Open	6	2	60	2	800
Commercial Loans	Not applicable	Deal Committee	B	Open	7	1.8	70	2	800
Commercial Loans	Not applicable	Final Negotiation	B	Open	8	1.5	80	2	800
Commercial Loans	Not applicable	Underwriting Contract	C	Open	9	1.3	85	3	800
Commercial Loans	Not applicable	Contract Signature	C	Open	10	1.2	95	2	800
Commercial Loans	Not applicable	Loan Fulfilled	C	Won	11	1	100	2	800
Equipment Finance	Not applicable	Equipment Evaluation	A	Open	1	3.5	10	5	800
Equipment Finance	Not applicable	Field Visit Completed	B	Open	2	3	20	4	800
Equipment Finance	Not applicable	Credit Check	B	Open	3	2.8	30	2	800
Equipment Finance	Not applicable	Research Analysis	B	Open	4	2.5	40	4	800
Equipment Finance	Not applicable	Deal Structured	B	Open	5	2.2	50	2	800
Equipment Finance	Not applicable	Draft Deal generated	B	Open	6	2	60	2	800

Sales Method	Description	Sales Stage Name	Phase	Status	Order	Quota Factor	Win Probability	Duration	Stalled Deal Limit
Equipment Finance	Not applicable	Deal Committee	B	Open	7	1.8	70	2	800
Equipment Finance	Not applicable	Final Negotiation	B	Open	8	1.5	80	2	800
Equipment Finance	Not applicable	Underwriting Contract	C	Open	9	1.3	85	3	800
Equipment Finance	Not applicable	Contract Signature	C	Open	10	1.2	95	2	800
Equipment Finance	Not applicable	Loan Fulfilled	C	Won	11	1	100	2	800
Retail Banking	Not applicable	Pre-Qualification	A - Qualification and discovery	Open	1	3.5	10	5	800
Retail Banking	Not applicable	Property Verification	B - Working on the deal	Open	2	3	20	4	800
Retail Banking	Not applicable	Due-Diligence Check	B - Working on the deal	Open	3	2.8	30	2	800
Retail Banking	Not applicable	Research Analysis	B - Working on the deal	Open	4	2.5	40	4	800
Retail Banking	Not applicable	Deal Structured	B - Working on the deal	Open	5	2.2	50	2	800
Retail Banking	Not applicable	Draft Deal generated	B - Working on the deal	Open	6	2	60	2	800
Retail Banking	Not applicable	Deal Committee	B - Working on the deal	Open	7	1.8	70	2	800
Retail Banking	Not applicable	Final Negotiation	B - Working on the deal	Open	8	1.5	80	2	800
Retail Banking	Not applicable	Underwriting Contract	C - Closing	Open	9	1.3	85	3	800
Retail Banking	Not applicable	Contract Signature	C - Closing	Open	10	1.2	95	2	800

Sales Method	Description	Sales Stage Name	Phase	Status	Order	Quota Factor	Win Probability	Duration	Stalled Deal Limit
Retail Banking	Not applicable	Loan Fulfilled	C - Closing	Won	11	1	100	2	800

16 Understand Role-Based Security

Understand Role-Based Access and Security Considerations

Oracle CX Sales implements role-based access control (RBAC) to prevent unauthorized access to application resources.

Users gain access to application functions and data when they're assigned job and abstract roles, which correspond to their roles in your organization. Users can have any number of different roles, and this combination of roles determines the resources that the user can access. The job role providing the greatest level of access takes precedence.

Role-based security in Oracle Cloud applications controls who can do what on which set of data. You assign job and abstract roles directly to users. Duty roles are associated with job and abstract roles; they're not assigned directly to users. You can assign job and abstract roles to a user manually, when you create the user, or automatically, when you create role provisioning rules. For more information on the tasks that you perform to implement role-based controls so that users have appropriate access to Oracle CX Sales data and functions, see Oracle CX Sales Securing Sales and Service guide.

To specify security setting for the roles:

1. On the Navigator, click **More**.
2. In **Configuration**, click **Application Composer**.
Application Composer Overview page opens.
3. Expand each object, click **Security**, and specify security settings.

The following table shows the roles in Financial Services.

Object	Application	Retail Banker	Retail Bank Manager	Commercial Banker	Commercial Bank Manager	Sales Admin for Financial Services
Financial Account	Common	View View All Update Update All	View View All Update Update All	View View All Update Update All	View View All Update Update All	Full
Transaction	Common	View View All	View View All	View View All	View View All	Full
Fin Account Contact	Common	View View All Update Update All	View View All Update Update All	Not applicable	Not applicable	Full

Object	Application	Retail Banker	Retail Bank Manager	Commercial Banker	Commercial Bank Manager	Sales Admin for Financial Services
Financial Summary	Common	Full	Full	Full	Full	Full
Daily Balance	Common	View View All Update Update All	View View All Update Update All	View View All Update Update All	View View All Update Update All	Full
Case	Common	Full	Full	Not applicable	Not applicable	Full
CaseToContact	Common	Full	Full	Not applicable	Not applicable	Full
CaseToResource	Common	Full	Full	Not applicable	Not applicable	Full

For information on how you implement and manage users and roles in Oracle CX Sales, see Oracle CX Sales Getting Started with Your Sales Implementation guide.

17 Update Needs Analysis Interviews

Update Needs Analysis Interviews

If you're upgrading Oracle CX Sales for Financial Services to release 13, you must update the needs analysis interviews for opportunity and lead.

Update mapping for child revenue for opportunity and lead to update the needs analysis interviews for opportunity and lead.

Map Child Revenue for Opportunity

To update an existing deployed Needs Analysis interview, download the deployed interview, perform the required changes in the interview, and redeploy the interview.

Following are the steps:

1. Sign in to the Intelligent Advisor hub.
2. Click **Deployments**.
3. From the list of deployments, select the interview that you must update to R13.
4. Download the latest version of the deployment.
5. Open the downloaded interview folder.
6. In the interview folder, open the `xprj` project using Oracle Policy Modeling.
7. Click **Data** tab.
8. In **Global**, click **Opportunity** object.
9. Create new entity with the name `optyChildRevenue`.
10. Select `optyChildRevenue` and click **Edit Entity** icon.
 - a. In the Mapping section, select `Opportunity/ChildRevenue` for the **Mapped to** field.
 - b. Click **OK**.
11. For the `optyChildRevenue` entity, create attributes specified in the following table:

Attribute Text	Type (Attribute)	MappedIn	MappedOut
<code>OptyChildRevenue</code> <code>Prodname</code>	Text	Name	Name
<code>OptyChildRevenue</code> <code>InvItemId</code>	Number	InventoryItemId	InventoryItemId
<code>OptyChildRevenue</code> Revn Id	Number	RevnId	RevnId
<code>OptyChildRevenue</code> Opty Id	Number	OptyId	OptyId

Attribute Text	Type (Attribute)	MappedIn	MappedOut
OptyChildRevenue org id	Number	OrganizationId	OrganizationId
OptyChildRevenue Amount	Number	RevnAmount	RevnAmount

- a. Select `OptyChildRevenue` entity for the Global **Opportunity** object.
- b. Click **New Attribute**.
- c. Enter `Attribute Text`, `MappedIn`, and `MappedOut` values for the attribute.
- d. Click **OK**.
- e. Repeat steps 11.1 to 11.4 for all the attribute text values.

Map Child Revenue for Lead

To update an existing deployed Needs Analysis interview, download the deployed interview, perform the required changes in the interview, and redeploy the interview.

Following are the steps:

1. Sign in to the Intelligent Advisor hub.
2. Click **Deployments**.
3. From the list of deployments, select the interview that you must update to R13.
4. Download the latest version of the deployment.
5. Open the downloaded interview folder.
6. In the interview folder, open the `xprj` project using Oracle Policy Modeling.
7. Click **Data** tab.
8. In Global, click **Lead** object.
9. Create new entity with the name `ChildRevenue`.
10. Select `ChildRevenue` and click **Edit Entity** icon.
 - a. In the Mapping section, select `Lead/Mk1ProdAssoc1` for the **Mapped to** field.
 - b. Click **OK**.
11. For the `ChildRevenue` entity, create attributes specified in the following table:

Attribute Text	Type (Attribute)	MappedIn	MappedOut
ChildRevenue InvItemId	Number	InventoryItemId	InventoryItemId
ChildRevenue Id	Number	LeadProductId	LeadProductId
ChildRevenue Lead Id	Number	LeadId	LeadId
ChildRevenue orgid	Number	OrganizationId	OrganizationId
ChildRevenue Amount	Number	Amount	Amount

Attribute Text	Type (Attribute)	MappedIn	MappedOut

- a. Select `childRevenue` entity for the Global **Lead** object.
- b. Click **New Attribute**.
- c. Enter `Attribute Text`, `MappedIn`, and `MappedOut` values for the attribute.
- d. Click **OK**.
- e. Repeat steps 11.1 to 11.4 for all the attribute text values.

Deploy the Interview

Deploy the interview after performing the changes. Ensure that the interview is deployed with its previous name.

18 Understand Adaptive Case Management

Application Composer Configuration for Case Management

Prepare Environment for Application Composer Configuration for Case Management

You must prepare the environment with the required roles and their role codes for the adaptive case management application composer configuration.

Following are the steps:

1. Create a user with the following roles assigned.

Role	Role Code	Required By
Employee	ORA_PER_EMPLOYEE_ABSTRACT	Not applicable
IT Security Manager	ORA_FND_IT_SECURITY_MANAGER_JOB	Security Console
Customer Relationship Management Application Administrator	ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB	CRM; Application Composer
Sales Administrator	ORA_ZBS_SALES_ADMINISTRATOR_JOB	Not applicable
Application Implementation Consultant	ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB	Page Integration

2. Enable **Portable Metadata** profile option if you're using portable metadata.
3. Create a sandbox environment and use it.

Configure Fields for the Data Model Configuration

You must create custom fields for service request.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.

3. Go to **Service Request > Fields**.
4. On the Custom page, click **Create a custom field** icon.
5. Create the following fields:
 - a. Process Status (Type: Choice List (Fixed))
 - i. In List of Values section, create a lookup type `CASE_PROCESS_STATUS` with meaning Case Process Status.
 - ii. Add the following lookup code values:
 - o Meaning: Not Started; Lookup Code: NOTSTARTED
 - o Meaning: Activated; Lookup Code: ACTIVATED
 - o Meaning: Canceled; Lookup Code: CANCELED
 - o Meaning: Completed; Lookup Code: COMPLETED
 - iii. In Constraints section, for **Depends On**, select **Title** field.
 - iv. Select **Updatable**, click **xyz expression** icon for **Updatable**, add the following groovy code: `return Title == null`
 - v. In Default Value section, select **Fixed Value** and select **Not Started**.
 - vi. Click **Save and Close** button.
 - b. Case Type (Type: Record Type)
 - i. In List of Values section, create a Lookup Type `SR_CASE_TYPE` with meaning SR Case Type with the following meanings:
 - a. Meaning: Deceased Estate; Lookup Code: `DECEASED_ESTATE`
 - b. Meaning: Separation; Lookup Code: `SEPARATION`
 - ii. In Constraints section, for **Depends On**, select **Process Status** field.
 - iii. Select **Updatable**, click **xyz expression** icon for **Updatable**, add the following groovy code: `return !vl(ProcessStatus_c, "") == "NOTSTARTED"`
 - iv. Click **Save and Close** button.
 - c. Date of Birth (Type: Date)
 - d. Date of Death (Type: Date)
 - e. Reporter Name (Type: Text)
 - f. Process Instance ID (Type: Text)
 - g. Reporter Relationship (Type: Choice List(Fixed))
 - i. In List of Values section, create a Lookup Type `REPORTER_RELATIONSHIP` with meaning as Reporter Relationship.
 - ii. Add following lookup code values:
 - o Meaning: Spouse; Lookup Code: SPOUSE
 - o Meaning: Child; Lookup Code: CHILD
 - o Meaning: Brother; Lookup Code: BROTHER
 - o Meaning: Sister; Lookup Code: SISTER
 - o Meaning: Parent; Lookup Code: PARENT
 - o Meaning: Other; Lookup Code: OTHER

Note: Corresponding to each of the custom fields, select **Searchable** and **Include in Service Payload** check boxes.

Configure Default Fields for Service Request

You must configure default fields for service request.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Service Request > Fields**.
4. On Standard page, find and modify the following fields:
 - a. Reported By: Change display label to **Case Manager**.
 - b. Primary Contact: Change display label to **Deceased Name**.

Configure Service Request Status Values

You must configure service request status values.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
Ensure that you're in a sandbox environment.
3. In the Setup and Maintenance work area, search for:
 - o Task: Manage Service Request Status Values
4. Drill down to **Manage Service Request Status Values** task.
5. Select **Resolved** type.
6. Click **Create Status** button.
7. In the new value row, enter the following information:
 - a. Status Name: Canceled
 - b. Status Short Name: `SVC_CANCELED`
 - c. Ranking: 50
8. Click **Save and Close** button.

Create Custom Fields for Service Request Contact Member

You must create custom fields for service request contact member.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.

2. Navigate to Application Composer.
3. Go to **Service Request > Contact Member**.
4. In the Custom page, click **Create a custom field** icon.
5. Create the following fields:
 - a. Function (Type: Choice List (fixed) <SR Contact Function>, code: SR_CON_FUNCTION)
 - b. Values/Code:
 - i. Administrator/ADMIN
 - ii. Attorney/ATTORNEY
 - iii. Beneficiary/BENEFICIARY
 - iv. Executor/EXECUTOR
 - c. Relationship (Type: Choice List (fixed) <Relationship Phrases>, code: PARTY_RELATIONS_TYPE)
 - d. Values/Code: This is a pre-existing choice list.

Create Custom Fields for Contact

You must create custom fields for contact.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Contact > Fields**.
4. On the Custom page, click **Create a custom field** icon.
5. Create the following fields:
 - a. Employer (Type: Text)

Web Service Configurations

Register Web Service for Initiate Action Plan

You must register web service for Initiate Action Plan.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Common Setup > Web Services**.
4. Click **New** icon for creating web service reference.
5. Select **REST** type and click **OK**.
6. Specify **InvokeProcess** as the name.
 - **Note:** This will be referenced in Object Function groovy script.
7. Enter the PCS REST call URL.

- a. Format: **https://<OIC Server URL>/bpm/api/4.0/dp-instances?processDefinitionKey=<Process Definition Key>**
- b. For the Process Definition Key value for your application:
 - i. You can use the GET request with any REST client: **https://<OIC Server URL>/bpm/api/4.0/dp-definitions**
 - ii. From the returned results, identify the **key** value for your application.
8. For authentication schema, select **Call with basic authentication**.
9. For credential key, click **+** sign to add the Oracle Process Cloud Service process owner user credential. Provide a name to the key.
10. Select **POST** as the method to expose.
11. Insert the following code sample for **Request Payload**:

```
{
  "srNumber": "SR0000013015",
  "deceasedName": "testDeceased2",
  "deceasedDate": "2018/09/09",
  "reportedBy": "testreportedby",
  "reportersPhone": "123456",
  "primaryContact": "testcontact",
  "primaryContactId": "300000001285204",
  "primaryContactsPhone": "223456"
}
```

12. Put in {} as sample code sample for **Response Payload**. Click **Save and Close**.

Register Web Service for Reading Task ID

You must register web service for reading task ID.

Following are the steps:

1. Create new Web Service named **ReadTaskIdBySR**.
2. Enter the Oracle Process Cloud Service URL in the format: **https://<OIC Server URL>/ic/api/process/v1/tasks?keyword=##SrNumber##**
3. For authentication schema, select **Call with basic authentication**.
4. For **Credential Key**, select the key value created in the previous step.
5. Select the **GET** method to expose.
6. For **Request Payload**, select **use schema url**.
7. For **Response Payload**, provide the following sample code:{"title": "Cancel Action Plan for SR: SR0000013038", "number": 200379}
8. Click **Save and Close**.

Register Web Service for Cancel Action Plan

You must register web service for canceling action plan.

Following are the steps:

1. Create new web service named **InvokeCancelTask**.

2. Enter the Processes for Oracle Integration URL in the format: **https://<OIC Service URL>/ic/api/process/v1/tasks/##taskId##**
3. For authentication schema, select **Call with basic authentication**.
4. For **Credential Key**, select the key value created in the previous step.
5. Select the **PUT** method to expose.
6. For **Request Payload**, provide the following code sample: { "action": {"id": "SUBMIT", "type": "SYSTEM"} }
7. Put in {} as sample code for **Response Payload**.
8. Click **Save and Close**.

Configure Object Functions for Service Request

Configure an Object Function for Initiate Action Plan

You must configure an object function for initiating action plan.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Service Request > Server Scripts**.
4. Go to **Object Functions** tab.
5. Click **New** icon to add a new object function.
6. Provide the function name as **LaunchProcess**.
7. Enter the following groovy code:

```
def POST_param =
[
  srNumber: SrNumber,
  deceasedName: nvl(PrimaryContactPartyName, "null"),
  deceasedDate: DateOfDeath_c,
  reportedBy: nvl(ReporterName_c, "null"),
  reportersPhone: nvl(ReportedByFormattedPhoneNumber, "4372541567"),
  primaryContact: nvl(PrimaryContactPartyName, "null"),
  primaryContactId: PrimaryContactPartyId,
  primaryContactsPhone: nvl(PrimaryContactFormattedPhoneNumber, "4372541555")
]

println("srNumber: "+POST_param.srNumber)
println("deceasedName: "+POST_param.deceasedName)
println("deceasedDate: "+POST_param.deceasedDate)
println("reportedBy: "+POST_param.reportedBy)
println("reportersPhone: "+POST_param.reportersPhone)
println("primaryContact: "+POST_param.primaryContact)
println("primaryContactId: "+POST_param.primaryContactId)
println("primaryContactsPhone: "+POST_param.primaryContactsPhone)

println("ProcessStatus_c: "+ProcessStatus_c)

if (ProcessStatus_c != 'NOTSTARTED')
{
  println("Process can only be activated once.")
  return
}
```

```

if (PrimaryContactPartyName == null)
{
    def msg='Please fill in "Deceased Name" field before initiating action plan.'
    throw new oracle.jbo.ValidationException(msg)

    return
}

if (DateOfDeath_c == null)
{
    def msg='Please fill in "Date of Death" field before initiating action plan.'
    throw new oracle.jbo.ValidationException(msg)

    return
}

println("CaseType_c:"+CaseType_c)

if (nvl(CaseType_c,"").equalsIgnoreCase("DECEASED_ESTATE"))
{
    println("Invoking process..")

    def conn=adf.webServices.InvokeProcess //This maps to the WS name created in previous steps
    try{
        def result = conn.POST(POST_param)
        def instanceId=result["id"].toString()
        println("instanceId:"+instanceId)

        setAttribute('ProcessInstanceId_c', instanceId)
        setAttribute('ProcessStatus_c', "ACTIVATED")
        setAttribute('StatusCd', "ORA_SVC_INPROGRESS")

        println("Status:"+conn.statusCode)

    }catch(Exception e){
        println("Headers:"+conn.responseHTTPHeaders)
        println("Status:"+conn.statusCode)
        println("Error:"+e)

        def msgError='Failed to initiate action plan. Please contact your administrator.'
        throw new oracle.jbo.ValidationException(msgError)
    }
}

```

8. Click **Save and Close**.

Configure an Object Function for Cancel Action Plan

You must configure an object function for canceling action plan.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Service Request > Server Scripts**.
4. Go to **Object Functions** tab.
5. Click **New** icon to add a new object function.
6. Provide the function name as **CancelProcess**.

7. Enter the following groovy code:

```
def conn = adf.webServices.ReadTaskIdBySR

try{
  def task = conn.GET("Cancel SR:"+SrNumber)
  def taskId = task["items"]["number"].toString()
  def len = length(taskId)

  println("taskId: "+taskId +len)

  if (len <3)
  {
    println("error finding cancel task")
    def msg='There is no activate action plan for this SR.'
    throw new oracle.jbo.ValidationException(msg)
  }

  taskId = right(left(taskId, len-1), len -2)
  println("taskId: "+taskId)

  def action=[
    "action": [ "id": "SUBMIT", "type": "SYSTEM" ]
  ]

  conn = adf.webServices.InvokeCancelTask

  def result = conn.PUT(taskId, action)
  println("Status:"+conn.statusCode)

  //set SR status field value to 'Cancelled'
  setAttribute('StatusCd', 'SVC_CANCELLED')
  setAttribute('ProcessStatus_c', 'CANCELLED')

  println("Setting SR status to Cancelled")

  //delete primary child contact from the SR

}catch(Exception e){
  println("Headers:"+conn.responseHTTPHeaders)
  println("Status:"+conn.statusCode)
  println("Error:"+e)
  def msg='Error cancelling Action Plan:'+e
  throw new oracle.jbo.ValidationException(msg)

  return
}

def msgSuccess='Action Plan has been cancelled. Please close SR record.'

throw new oracle.jbo.ValidationException(msgSuccess)
```

8. Click **Save and Close**.

Configure Actions for Service Request

You must configure actions for service request.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Service Request > Actions and Links**.
4. Click **New** icon to create an action.
5. Specify **Display Name** as **Initiate Action Plan**.
Name is generated with spaces removed.
6. Select **Action type**.
7. For **After the Script Runs**, select **Save and Edit the record**.
8. Select the **Method Name** with the **Object Function Name** defined in the previous step.
9. Click **Save**.
10. Create another **action** with name **Cancel Action Plan**.
11. Select the **Method Name** corresponding to **Cancel Action Plan**.
12. Click **Save**.

Configure Service Request Creation Page Layouts

Configure Default Custom Layout

You must configure the Default Custom layout.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Contact > Pages**.
4. In **Edit Contact, Details Page Layouts** section, select **Standard Layout**, click **Duplicate** icon and name it as **Default Custom Layout**.
5. Drill down to the layout, click **Edit** icon corresponding to Contact Overview Subtab.
6. Add the following fields to the layout:
 - o Person Deceased
 - o Employer
7. Click **Save**.

Configure Deceased Estate Layout

You must configure the deceased estate layout.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.

3. Go to **Service Request > Pages**.
4. In **Creation Page Layouts** list, select **Default Case Layout**, click **Duplicate** icon, and enter the name as **Deceased Estate Layout**.
5. Edit the layout and add **Date of Death** field.
6. Click **Save**.
7. In **Creation Page Layouts** list, select **Deceased Estate Layout**, for **Case Type** value, select **Deceased Estate**.

Configure Service Request Details Page Layouts

Configure Default Custom Layout

You must configure the Default Custom layout.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Contact > Pages**.
4. In **Edit Contact, Details Page Layouts** section, select **Standard Layout**, click **Duplicate** icon and name it as **Default Custom Layout**.
5. Drill down to the layout, click **Edit** icon corresponding to Contact Overview Subtab.
6. Add the following fields to the layout:
 - o Person Deceased
 - o Employer
7. Click **Save**.

Configure Before Action Plan Layout

You must configure the Before Action Plan layout.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Service Request > Pages**.
4. In **Details Page Layouts** section, select **Standard Layout**.
5. Click **Duplicate** icon, name the layout **Before Action Plan**.
6. Edit the layout and add the following fields to the layout:
 - o Case Type
 - o Date of Birth
 - o Date of Death
 - o Process Status

- Reporter Name
 - Reporter Relationship
7. Remove the **Account** field.
 8. In **Configure Detail Form: Buttons and Actions** section, move the **Initiate Action Plan** button that you created in previous steps to **Selected Buttons** section.
 9. Click **Save**.
 10. Go to Contacts subtab layout.
 11. Click **Edit** icon corresponding to Contact subtab.
 12. Add **Function** from **Available Fields** to **Selected Fields**.
 13. Click **Save and Close**.
 14. Click **Done**.
 15. Go back to Detail Page Layout list, select **Before Action Plan** layout.
 16. Specify **Type** as **Deceased Estate**.
 17. Edit the custom layout expression using the **xyz** icon.
 18. In Advanced Expression dialog box, enter `return nvl(ProcessStatus_c,"") == "NOTSTARTED"`.
 19. For **Depends On** choice, select **Process Status** field.
 20. Click **Validate and Save**.

Configure After Action Plan Layout

You must configure the After Action Plan layout.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Service Request > Pages**.
4. In **Details Page Layouts** section, duplicate the **Before Action Plan** layout.
5. Click **Edit** button on the Summary page.
6. In **Configure Detail Form: Buttons and Actions** section, remove the **Initiate Action Plan**, and add the **Cancel Action Plan** button.
7. Click **Save**.
8. Go back to Detail Page Layout list, select **After Action Plan** layout.
9. For **Type**, select **Deceased Estate**.
10. Edit the custom layout expression using the **xyz** icon.
11. In Advanced Expression dialog box, enter `return nvl(ProcessStatus_c,"") == "ACTIVATED"`.
12. For **Depends On** choice, select **Process Status** field.
13. Click **Validate and Save**.

Configure After Canceled Layout

You must configure the After Canceled layout.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.

2. Navigate to Application Composer.
3. Go to **Service Request > Pages**.
4. In **Details Page Layouts** section, duplicate the **After Action Plan** layout.
5. Click **Edit** button on the Summary page.
6. In **Configure Detail Form: Buttons and Actions** section, remove the **Cancel Action Plan** button.
7. Click **Save**.
8. Go back to Detail Page Layout list, select **After Canceled** layout.
9. For **Type**, select **Deceased Estate**.
10. Edit the custom layout expression using the **xyz** icon.
11. In Advanced Expression dialog box, enter `return nvl(ProcessStatus_c,"") == "CANCELLED" || nvl(ProcessStatus_c,"") == "COMPLETED"`
12. For **Depends On** choice, select **Process Status** field.
13. Click **Validate and Save**.

Configure Contact Details Page Layouts

Configure Default Custom Layout

You must configure the Default Custom layout.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Contact > Pages**.
4. In **Edit Contact, Details Page Layouts** section, select **Standard Layout**, click **Duplicate** icon and name it as **Default Custom Layout**.
5. Drill down to the layout, click **Edit** icon corresponding to Contact Overview Subtab.
6. Add the following fields to the layout:
 - o Person Deceased
 - o Employer
7. Click **Save**.

Verification and Diagnoses

You must enable runtime messages for verification and diagnoses.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. To enable runtime messages, go to **Common Setup > Run Time Message**.
4. Select **Enable Application Script Logging**.
5. Go to Service Request and go to a record detail page.

6. Click the action button added in previous steps.
7. Cancel the record.
8. Navigate to Application Composer.
9. Go to **Common Setup > Run Time Message**.
10. Verify the messages logged by `println` code in Object Function Groovy code.

Display Task List in Subtab Configurations

Register a Web Application for Mashup Content

You must register a web application for mashup content.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Common Setup > Mashup Contents**.
4. Click **Register Web Application** button.
5. Enter a name such as **PCStasks**.
6. For **Type**, select **Groovy Expressions**.
7. Enter the URL in the following format: **https://<OIC Server Url>/ic/pub/components/pages/**

Add the Contents to Subtabs of Service Request

You must add contents to subtabs of service request.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Service Request > Detailed Page Layout**.
4. Edit all three detail layouts and add a subtab for Assigned Tasks page. For After Action Plan and After Canceled layouts, add another subtab for Action Plan page.
5. Reference the registered web application mashup content in groovy as follows:

- a. Assigned Tasks:

```
return
oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('ic')+"tasklist.html?
hideSearch=true&hideSelectAll=true&tasklistFilter={"keyword\":"\":"+SrNumber+"\}"
```

- b. Action Plan:

```
return
oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('ic')+"dpdetail.html?
instanceId="+ProcessInstanceId_c
```

- c. Change the subtab titles to Assigned Tasks and Action Plan respectively.

Configure My Worklist and My Tasks for Home page

Configure Page Integration

You must configure for page integration.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Configuration > Page Integration**.
4. Click **New Page** button.
5. Set **Name** to **My Tasks**.
6. Set **Category Name** to **Case management**.
7. Select an icon.
8. For application role, select a custom role assigned to user.
Case Management job role is a copied role from the default Sales Administrator.
9. For web page, set **https://<OIC Service URL>/ic/pub/components/pages/tasklist.html?pageSize=8**
10. Click **Save and Close** button.
11. Repeat steps 8 to 10 for **My Worklist** with **https://<OIC Service URL>/ic/pub/components/pages/dplist.html**
12. Click **Save and Close** button.

Expose New Pages to UI

You must expose new pages to UI.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Configuration > Structure**.
4. Scroll down to locate **Case Management** in the list. Expand it.
5. Locate **My Tasks** and click the **Arrow** icon.
6. Move **My Tasks** to **Top Level** group.
Navigate to Home page. You can view the **My Tasks** icon.
7. Repeat steps 5 to 6 for **My Worklist**.

Perform UI Adjustments

You must perform UI adjustments.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Click **My Task** icon.
3. Click **Edit Pages** from the Settings and Actions menu.
4. Click **Edit** icon.
5. Go to Display tab, for **Layout**, select **Stretch**.
6. Go to Style tab, for **height**, enter value as **700px**.
7. Click **Close** button to exit UI configuration.
8. Repeat the steps 2 to 7 for **My Worklist**.

Add Field Validations

Validate that Date of Death isn't a Future Date

You must add new field validations section.

Following are the steps:

1. Sign in to Oracle CX Sales using administrator role.
2. Navigate to Application Composer.
3. Go to **Service Request > Server Scripts**.
4. On Validation Rules page, in **Field Rules** section, click **New** icon.
5. For field name, select **Date of Death**.
6. Provide a rule name such as **ValidateDoD**.
7. Provide the **Date of Death cannot be set to a future date** error message.
8. Add the following rule for validations groovy code:

```
return (newValue < today())
```

Add Field Triggers

Set Date of Birth with Value from Contact

You must set the date of birth with value from contact

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Service Request > Server Scripts > Triggers**.
4. In the Field Triggers section, click **New** icon.

5. For the field name, select **Primary Contact ID**.
6. Enter the trigger name as **PrimaryContactChanged**.
7. Add the following groovy code in trigger definition:

```
def vo = newView('PersonProfile')
if (isAttributeChanged('PrimaryContactPartyId') && PrimaryContactPartyId != null){
  def foundRows = vo.findByKey(key(PrimaryContactPartyId),1)
  if (foundRows != null){
    def found = foundRows.size() == 1 ? foundRows[0] : null;
    if (found != null) {
      DateOfBirth_c = found.getAttribute("DateOfBirth")
    }
  }
}
```

8. Click **Save and Close**.

Add Object Triggers

Set Service Request Contact List from Contact Relationships

You must set service request contact list from contact relationships.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. Navigate to Application Composer.
3. Go to **Service Request > Server Scripts > Triggers**.
4. In the Object Triggers section, click **New** icon.
5. For the trigger, select **Before Insert in Database**.
6. Enter the trigger name as **InsertRecord**.
7. Add the following groovy code in trigger definition:

```
if (Type_c == "DECEASED_ESTATE" && ContactPerson != null)
{
  def conVO = contacts
  ArrayList contactParties = new ArrayList()
  while (conVO.hasNext())
  {
    def con = conVO.next()
    contactParties.add(con.PersonProfileId)
  }
  def relVO = ContactPerson.Relationship
  while (relVO.hasNext())
  {
    def relation = relVO.next()
    if (relation.ObjectType == "PERSON" && contactParties.indexOf(relation.ObjectId) == -1)
    {
      def relationCopy = conVO.createRow()
      relationCopy.setAttribute("SrId",SrId)
      relationCopy.setAttribute("ContactPartyName",relation.ObjectPartyName)
      relationCopy.setAttribute("PartyId",relation.ObjectId)
      relationCopy.setAttribute("Relationship_c",relation.RelationCode)
      conVO.insertRow(relationCopy)
    }
  }
}
```

```
}  
}
```

8. Click **Save and Close**.

Download and Use Oracle Integration Application Template for the Deceased-Estate

You must download, configure, and use the Oracle Integration application template for the deceased-estate as a part of the Oracle Integration configuration process. The template is designed to support you with the Oracle Integration configuration process. The template can be changed and maintained to

Download Oracle Integration Application Template

Oracle Integration application template for the deceased-estate is available as a part of the collateral available for the Adaptive Case Management (My Oracle Support Document ID 2077119.1).

Configure and Use Oracle Integration Application Template for the Deceased-Estate

After downloading the Oracle Integration template for the deceased-estate, perform steps in the following sections.

Set Up Users in Oracle Integration

You must set up users in Oracle Integration using Oracle Identity Cloud Service. Detailed steps related to setting up users are available in the Oracle Identity Cloud Service Configuration section in this chapter.

Set Up Dynamic Process Application

You must set up dynamic process application. Setting up dynamic process application comprises of the following four broad steps:

1. Creating an Application:

Following are the steps to create an application:

- a. Sign into Oracle Integration Composer.
- b. Click **Applications**.
- c. Import the predefined **Inheritance Management** application.
- d. Drill down to the application.
- e. Drill down to the **Inheritance Management** process.
- f. Click **Edit** button for edit mode.
- g. Configure the application wherever required. See Oracle Integration guide for details.

2. Configuring Integration:

Following are the steps to configure integration:

- a. Navigate to Integrations page.

- b. Drill down to REST Connector.
- c. Change the URL to point to the correct Oracle CX Sales instance.
- d. Click **Security** tab, select **APP Id - Basic Authentication**.
- e. Create new keystore credential using the Oracle CX Sales credential.

Note: The Oracle CX Sales user must have the full access to all contacts and service requests.

3. Testing and Publishing the Application:

Following are the steps to test and publish the application:

- a. After the configuration is completed, click **Save**.
- b. Click **Test** button.
- c. Verify and ensure that there are no errors.

Note: In case there are any warnings, you need not take any action.

- d. Click **Publish** button.
- e. In case there's no change to publish, proceed to the next step of activating the application.

4. Activating the Application:

Following are the steps to activate the application:

- a. Click **Activate** button to navigate to the Activation page.
- b. Click **Activate a new version** button.
- c. Go through the questionnaire steps. For **Select a snapshot** leave the default choice of **Last published version** selected.
- d. Click **Customize** button.
- e. For **Security**, select **Use design-time credentials and certificates** or select the **App Id - Basic Auth**, enter a new key with OIC credential, or select a predefined one.
- f. Click **Validate** button.
- g. Click **Options** button.
- h. Provide a revision number and select **Force default**.
- i. Click **Active** button.
- j. Click **Finish** after the application is activated.

Set Up Roles and Test the Process with a REST Client

You must set up roles in Oracle Integration workspace using Oracle Identity Cloud Service. Detailed steps related to setting up roles are available in the Oracle Identity Cloud Service Configuration section in this chapter.

Test the Process with a REST Client

You must test the process with a REST client. Following are the steps:

1. Find out the process key using following steps:
 - o Use a GET request with any REST client: **https://<OIC Server URL>/bpm/api/4.0/dp-definitions**

- From the response, find the item that contains your application name. Find out the key value of the item. It's the process definition Key for POST request.
- Run a POST request on the dynamic process instance, with the key value as the processDefinitionKey value: **https://<OIC Server URL>/bpm/api/4.0/dp-instances?processDefinitionKey=<Process Definition Key>**
- Verify in the Oracle Integration workspace to see if dynamic process and tasks are generated.

Set Up Intelligent Advisor Connection

You must set up Intelligent Advisor connection.

Following are the steps:

- Sign into Intelligent Advisor Hub of the Intelligent Advisor instance and click **Connections**.
- Click **Actions** and select Create new connection.

You must provide connection information.

- Provide any appropriate Name such as **Case Management Connection** (host name), select Type as **Web service** from the drop-down list, specify **Collection Access** as **Default Collection**.
- In the Web Service Details section, enter an appropriate value for the URL such as **https://<oec host>/soa-infra/services/default/SalesPolicyConnectorComposite/SalesPolicyConnectorService**
- Select **Version** as **http://xmlns.oracle.com/policyautomation/hub/12.1/metadata/types** from the drop-down list.
- In the OAUTH for Data Operations section, ensure that you select the **Provide OAUTH bearer token in HTTP header on Load, Save, GetCheckpoint, SetCheckpoint and ExecuteQuery actions** check box. Specify **URL Parameter** as **oraAccessToken**.
- In the WS-Security section, ensure that you select the **Provide WS-Security Username token in SOAP actions** check box. For **Username**, provide value as **fusion**. Username must be a user with privileges similar to sales administrator. Provide value for the **New Password** and ensure that you select the **Include timestamp with a 5 minute expiration** check box.
- Ensure that **Status** is ready.
- Click **Save and Close**.

Deploy Intelligent Advisor Interview

You must deploy Intelligent Advisor interview.

Following are the steps:

- Sign in to Intelligent Advisor instance of version 12.2.13.170 or later.
- Unzip and copy the **Deceased Estate OPA** interview into a folder.
- Install Policy Modeler based on the steps available in the Install Policy Modeling section of the Policy Modeling User guide.
- Open the OPA Policy Modeling, click **Open Project > Other...**
- Select the **Deceased Estate.xprj** file inside the unzipped **OPA interview** folder.
- Click **Data tab > Mapping Settings**.

7. Click **change** link corresponding to **Connection** and select the connection that you created in the Setting Up Intelligent Advisor Connection topic.
8. If you encounter the **Certificate isn't trusted** error, follow the instructions available at the OPA Hub HTTPS Connection Failure (My Oracle Support Document ID 2201959.1) to resolve it.
9. Add **Mapped to** value as **ServiceRequest/Contact** by double-clicking the **contacts <ServiceRequest/Contact>** folder on the navigation panel.
10. Add attributes for **Input Mapping** and **Output Mapping** for **ServiceRequest** by double-clicking each attribute row in the list of attributes displayed.
11. Add attributes for **Input Mapping** and **Output Mapping** for **ServiceRequest/Contact** by double-clicking each attribute row in the list of attributes displayed.
12. Click **OK**.
13. Click **Project tab > Deploy Snapshot**.
14. Provide Intelligent Advisor Hub details in case they aren't already available.
15. Click **Deploy**.

Oracle Policy Modeling message appears stating that this will update an existing activated deployment. You can restore the old version at any time through the Hub.

16. Click **OK**.
17. Click **Close**.

Oracle CX Sales Setup

Register Intelligent Advisor Interview as a Web Application

You must register Intelligent Advisor interview as a web application.

Following are the steps:

1. Register the Intelligent Advisor interview as a web application instead of registering the Intelligent Advisor interview as a third party application. You can register a web application in Oracle CX Sales so that it can be embedded directly in an application page known as a mashup. To do this, follow the instructions provided in the Creating Mashups: Procedure topic in Oracle Applications Cloud Configuring Applications Using Application Composer guide.
2. On the Register Web Application page, specify the following settings:
 - o **Name:** A name for the web application (Add Details). This is the name that you will use in your groovy script.
 - o **Type:** Groovy expression
 - o **URL Definition:** The interview URL for the deployment. This can be copied from the deployment detail page of OPA Hub using the following step.
 - o Select the **Include JWT access token for API authentication** option.
3. The URL definition is available on the Deployment page of OPA Hub.
4. In the list of deployments, click the deployment name (Deceased Estate) that you deployed in the Deploying Intelligent Advisor Interview topic.
5. Use the URL corresponding to **Interview**.
6. Use the same user name and password that you use to sign into the Intelligent Advisor hub.

7. Use the following information as an example:
 - o Web Application Name: Add Details
 - o Type: Groovy expression
 - o URL Definition: The URL definition is available on the Deployment page of OPA Hub.
Select the **Include JWT access token for API authentication** option.
8. Click **Save and Close**.

Deploy Intelligent Advisor Interview Using a Link

You must deploy Intelligent Advisor interview using a link.

Following are the steps:

1. Navigate to Application Composer. For more information, see Oracle Applications Cloud Configuring Applications Using Application Composer guide.
2. To create a custom field, in the **Objects** navigation tree, navigate to the object where you want to include the subtab (for example, Contact, Account, Opportunity, or Lead) and select **Fields**.
3. On the **Custom** tab, in the Action menu, select **Create**.
4. In the Select Field Type window, select **Formula**, and click **OK**.
5. On the Describe Field page, provide the following details:
 - o **Formula Type:** Text
 - o **Display Label:** Enter a display label for the field as **Add Details**.
 - o **Display Name:** Leave as default.
 - o **Constraints:** This is optional value. Select the fields whose data changes will cause this formula's field value and constraint expressions to be re-evaluated.

6. Click **Next**.

7. On the Configure Expression page, in the Edit Script box, enter the following groovy script with end point for the third party application setup of Intelligent Advisor.

```
def jwtToken=new
oracle.apps.fnd.applcore.common.SecuredTokenBean().getTrustToken();
oracle.topologyManager.client.deployedInfo.DeployedInfoProvider.getEndPoint('Banff_OPA')+"?
SurveyCaseId="+SrId+"&oraAccessToken="+jwtToken+""
```

8. Click **Submit**.
9. To create new action that refers to the custom field, in the **Objects** navigation tree, select **Actions and Links** for the object for which you created the custom field.
10. On the Actions and Links page, in the Actions menu, select **Create**.
11. On the Create Action or Link page, provide the following details:
 - o **Display Label:** Add Details
 - o **Name:** default
 - o **Type:** Link
 - o **Source:** URL
 - o **Edit Script:** enter **return AddDetails_c**

12. Click **Save**.
13. To add the new action to the page, in the **Objects** navigation tree, select **Pages** for the object for which you created the custom field and action.
14. On the Simplified Pages tab, in the Details Page Layouts section, duplicate the standard layout to create new layout to edit or edit another existing layout.
15. On the Details Layout page, click **Edit** icon.
16. Add **Add Details - Link** field to Summary subtab.
17. Click **Save and Close**.
18. On the Details Layout page, click **Done**.

Set Up Profile Options for Contact Type

You must set up profile options for contact type.

Following are the steps:

1. Sign in to Oracle CX Sales using Administrator role.
2. In the Setup and Maintenance work area, go to the following:
 - o Functional Area: Application Extensions
 - o Task: Manage Administrator Profile Values
3. Search for **ZCA_DEFAULT_CONTACT_TYPE** profile option code.
4. Set the **Profile Option** value to **Customer**.

Oracle Identity Cloud Service Configurations for Adaptive Case Management

Set Up Users and Roles in Oracle CX Sales for Adaptive Case Management

For adaptive case management, you must create oic_caseowner, oic_servicerep, and oic_backoffice roles and associate users to each of them.

For detailed information, see Setting Up Users and Roles chapter of the Oracle Customer Experience Cloud Getting Started with Financial Services Implementation guide.

Set Up User and Role Synchronization from Oracle CX Sales to Oracle Identity Cloud Service

Setting up user and role synchronization from Oracle CX Sales to Oracle Identity Cloud Service involves two steps.

Following are the steps:

1. User, role, and role-membership synchronization setup and execution.
2. Verifying synchronization result.

User, Role, and Role-Membership Synchronization Setup and Execution

Following are the steps required for user, role, and role-membership synchronization setup and initiation using the Oracle Identity Cloud Service Fusion Applications-Connector:

1. Sign into the appropriate Oracle Identity Cloud Service Admin Console using Administrator role.
2. Create new sync app and proceed using the following steps.

Note: In case, the app already exists and the fusion applications is refreshed, then verify the details and if required, change the password.

3. On the Oracle Identity Cloud Service Applications page, click **Add** to add a new application.
4. In the Add Application window, select **App Catalog**.
5. Search for Oracle Fusion Application Release 13 template and add the template.
6. Provide an appropriate name for the application.
7. Provide tenancy details such as **Tenant Name** and **Domain Name**.
8. Click **Next** and navigate to the next page.
9. For **Entity ID** field, enter a unique entity ID value and navigate to the next page.
10. **Enable Provisioning** using toggle button.
11. Enable the **Authoritative Sync** check box.
12. **Enable Synchronization** using toggle button.
13. Set the frequency as **Never** corresponding to the **Synchronization schedule** field.
14. Activate the application created in step 6.
15. Sign into the Oracle Fusion application to perform setup activities after predefined roles and users are available in the Oracle Fusion application.
 - a. Sign into the Oracle CX Sales using Administrator role and navigate to the Scheduled Processes page.
 - b. Click **Schedule New Process**.

Schedule New Process window opens.
 - c. For **Type**, select **Job**.
 - d. Specify **Name** as **Import User and Role Application Security Data**.
 - e. Click **Submit** to submit the job.
 - f. Navigate to the Schedule New Process window and submit another job.
 - g. For **Type**, select **Job**.
 - h. Specify **Name** as **Retrieve Latest LDAP Changes**.
 - i. In the **Process Details** section, click **Submit**.
 - j. In the list of processes, view, verify, and ensure that both **Retrieve Latest LDAP Changes** and **Import User and Role Application Security Data** processes run to completion.
16. Switch back to Oracle Identity Cloud Service.

Navigate to Oracle CX Sales in the Oracle Identity Cloud Service Application List page.
17. Corresponding to Oracle CX Sales, click **Import** tab to view import status.
18. Click **Refresh** and verify to ensure that **Last Import** is indicated as **Succeeded**.
19. Click **Provisioning** tab.

20. **Enable Synchronization** using toggle button.
21. In the Configure Synchronization section, set **Synchronization schedule** to **Every Hour**.
22. Click **Save**.

Verify Synchronization Result

You must verify the synchronization result.

Following are the steps to verify synchronization result:

1. Sign into the appropriate Oracle Identity Cloud Service Admin Console using Administrator role.
2. Navigate to **Groups**.
3. Search for the new roles added and verify that each of the new role is displayed as a group.
4. Drill down to each group and verify that the user association is correct.

Grant Access for Oracle Integration

You must grant access for Oracle integration.

Following are the steps to grant access for Oracle integration:

1. Sign into the appropriate Oracle Identity Cloud Service Admin Console using Administrator role.
2. Navigate to **Applications**.
Identify the application that's automatically generated after the Oracle Integration instance is created.
3. Drill down to the application.
4. Navigate to **Application Roles** tab.
5. In the list of application roles, navigate to **ServiceAdministrator**, click **Assign Groups** from menu.
6. Search for **oic_caseowner** and assign.
7. In the list of application roles, navigate to **ServiceUser**, click **Assign Groups** from menu.
8. Search for **oic_servicerep**, **oic_backoffice**, and assign.

Map Oracle Identity Cloud Service Groups to Oracle Integration Process Roles

Mapping Oracle Identity Cloud Service groups to Oracle Integration process roles comprises of assigning groups to process roles and assigning groups to dynamic process roles.

Assign Groups to Process Roles

You must assign groups to process roles. Following are the steps to assign groups to process roles:

1. Sign into Oracle Integration workspace as a user with **oic_caseowner** role.
2. Navigate to **Administration**.
3. In Process Roles tab, search for the application instance that you created and activated.

4. Select **<application instance>.Process Owner**.
5. Click **Add Member** button.
6. Search for **oic_caseowner**, select and add. Click **Save**.
7. Select **<application instance>.Clerk**.
8. Click **Add Member** button.
9. Search for **oic_servicerep**, select and add. Click **Save**.
10. Select **<application instance>.Back Office User**.
11. Click **Add Member** button.
12. Search for **oic_backoffice**, select and add. Click **Save**.

Assign Groups to Dynamic Process Roles

You must assign groups to dynamic process roles. Following are the steps to assign groups to dynamic process roles:

1. In **Administration**, navigate to Dynamic Process Roles tab.
2. Search for the activated application instance version.
3. Select **<application instance>.Case Owner**.
4. Click **Edit Role** menu item.
5. In **Members** field, search for **oic_caseowner**, select and add. Click **Save**.
6. Select **<application instance>.Service Rep**.
7. Click **Edit Role** menu item.
8. In **Members** field, search for **oic_servicerep**, select and add. Click **Save**.
9. Select **<application instance>.Back Office User**.
10. Click **Edit Role** menu item.
11. In **Members** field, search for **oic_backoffice**, select and add. Click **Save**.

