Oracle Sales Cloud
Getting Started with Financial Services Implementation

Release 13 (update 18B)
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**Oracle Sales Cloud**

**Getting Started with Financial Services Implementation**
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Preface

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

Using Oracle Applications

Using Applications Help

Use help icons 🛠️ to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

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

You can also read Using Applications Help.

Additional Resources

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

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>boldface</td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td>monospace</td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions

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

Audience and Scope

This guide is intended for anyone who is 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 Sales Cloud. The guide does not cover the implementation activities for Oracle Sales Cloud.

If you want to set up and work with the additional features of Oracle Sales Cloud, see Oracle Sales Cloud 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>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
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<tbody>
<tr>
<td>Oracle Sales Cloud Getting Started with Your Implementation</td>
<td>Describes how to set up a sales automation solution in Oracle Sales Cloud using a case study to describe concepts and procedures.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Extending Sales</td>
<td>Describes how to use tools to configure and extend the Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Securing Sales Cloud</td>
<td>Describes how to implement user access to Sales Cloud functions and data.</td>
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</table>

Related Topics

- Oracle Help Center
2 Implementation Overview

Setup Tasks List

This topic provides a summary about the tasks that you must perform to set up Oracle Sales Cloud 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.

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<td>Adding Users to Job Roles</td>
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<td>Setup and Maintenance work area: Manage Standard Lookups</td>
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<td>Setting Up Profile Option</td>
<td>Setup and Maintenance work area: Manage Administrator Profile Values</td>
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<td>Configuring File Import and Export</td>
<td>Application Composer: Common Setup</td>
</tr>
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<td>Configuring Sales Processes</td>
<td>Setup and Maintenance work area: Manage Sales Methods and Sales Stages</td>
</tr>
<tr>
<td>Setup Activity</td>
<td>Work Area and Tasks</td>
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<td>----------------------------------------------------------</td>
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<td>Structure</td>
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<td>Enabling Households</td>
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<td>Creating Job Roles for Assigning to Newly Provisioned Contacts for Case</td>
<td>Security Console</td>
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<tr>
<td>Adding Case Object View Access to the Newly Created Custom Role</td>
<td>Application Composer</td>
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<tr>
<td>Adding Data Security Policies</td>
<td>Security Console</td>
</tr>
<tr>
<td>Creating Job Roles for Adding Permission to Access User Provisioning Functionality</td>
<td>Security Console</td>
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<td>Adding External Users to Oracle Social Network</td>
<td>Oracle Social Network: Administration</td>
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<td>Creating Defaulted Tasks</td>
<td>Setup and Maintenance work area: Manage Standard Lookups</td>
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<td>Application Composer: Standard Objects</td>
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<td>Creating Object Workflow</td>
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</tr>
<tr>
<td>Enabling Conversations Subtab in Case</td>
<td>Setup and Maintenance work area: Manage Oracle Social Network Objects</td>
</tr>
</tbody>
</table>

You must perform the steps provided in this guide in conjunction with, or after completing the steps mentioned in Oracle Sales Cloud Getting Started with Your Implementation guide.
3 Setting Up Users and Roles

Importing 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 Sales Cloud as a user with IT Security Manager role.
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.

Setting 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 either by using collateral provided or by configuring 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 Sales Cloud 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 Sales Cloud using Application Implementation Consultant role.
3. Select Incoming tab.
4. Click Browse button.
5. Select the jar file.
6. Click Apply button.

Note: Since you used simplified setup for setting up the financial services roles, do not 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.
Creating 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 are required to create roles only once. Do not 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 are not shipped with Oracle Sales Cloud.

1. Sign in to Oracle Sales Cloud 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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Name</td>
<td>Retail Banker</td>
</tr>
<tr>
<td>Role Code</td>
<td>AFS_RETAIL_BANKER</td>
</tr>
<tr>
<td>Description</td>
<td>Represents the business to sell its products to Customers. Maintains relationships with key customers, builds pipeline, manages leads and opportunities and performs sales forecasting.</td>
</tr>
</tbody>
</table>

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. Check **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.
Creating 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 are required to create roles only once. Do not 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 are not shipped with Oracle Sales Cloud.

1. Sign in to Oracle Sales Cloud as a user with IT Security Manager role.
   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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Name</td>
<td>Commercial Banker</td>
</tr>
<tr>
<td>Role Code</td>
<td>AFS_COMMERCIAL_BANKER_JOB</td>
</tr>
<tr>
<td>Description</td>
<td>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.</td>
</tr>
</tbody>
</table>

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. Check **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.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Name</td>
<td>Commercial Bank Manager</td>
</tr>
<tr>
<td>Role Code</td>
<td><strong>AFS_COMMERCIAL_BANK_MANAGER_JOB</strong></td>
</tr>
<tr>
<td>Description</td>
<td>Manages commercial bankers within the organization. Generates revenue within a territory, builds pipeline, manages territory forecasts, and assists salesperson in closing deals.</td>
</tr>
</tbody>
</table>

Creating Administrator Roles for Financial Services

You must create administrator roles for financial services.

**Note:** You are required to create roles only once. Do not 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 Sales Cloud 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**.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Name</td>
<td>Sales Admin for Financial Services</td>
</tr>
<tr>
<td>Role Code</td>
<td><strong>AFS_SALES_ADMIN_FINANCIAL_SERVICES</strong></td>
</tr>
<tr>
<td>Field</td>
<td>Value</td>
</tr>
<tr>
<td>----------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Description</td>
<td>Manages sales department and personnel. Performs ongoing administrative tasks, corrects erroneous data, and modifies the application according to business needs.</td>
</tr>
</tbody>
</table>

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. Check **Role Copy Status** in the Administration subtab.

Wait for **Status** to display as **Complete**.
4 Configuring Page Layouts and Adding Users to Roles

Assigning 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 Sales Cloud. For example, easily create a 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 Sales Cloud Extending Sales guide.

Using Application Composer, you can present the same Oracle Sales Cloud page to your users, but 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 Sales Cloud Extending Sales guide.

To assign a role to Retail Banking Layout:

1. Sign in to Oracle Sales Cloud 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 Case, Financial Account, Product, Transaction, Contact, Household, Opportunity, Sales Lead, and Activity.

   Note: Only customers using Inheritance Management application must set up the Provision Manager role.

Specify information as provided in the following table.

<table>
<thead>
<tr>
<th>Object Type</th>
<th>Object</th>
<th>Specific Object (if any)</th>
<th>Landing Page (Layout Name)</th>
<th>Create Page (Layout Name)</th>
<th>Detail Page (Layout Name)</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom</td>
<td>Case</td>
<td>Not applicable</td>
<td>Financial Services Retail Banking Layout</td>
<td>Not applicable</td>
<td>FINS Retail Layout</td>
<td>Retail Banker</td>
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<td></td>
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<td></td>
<td>Retail Bank Manager</td>
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<td></td>
<td></td>
<td>Provision Manager</td>
</tr>
<tr>
<td>Custom</td>
<td>Case</td>
<td>Not applicable</td>
<td>Financial Services Retail Banking Layout</td>
<td>FINS Retail Layout</td>
<td>Not applicable</td>
<td>Retail Banker</td>
</tr>
<tr>
<td></td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td>Retail Bank Manager</td>
</tr>
<tr>
<td>Custom</td>
<td>Financial Account</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>FINS Retail Layout</td>
<td>FINS Retail Layout</td>
<td>Retail Banker</td>
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<td>Retail Bank Manager</td>
</tr>
<tr>
<td>Custom</td>
<td>Transaction</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>FINS Retail Layout</td>
<td>FINS Retail Layout</td>
<td>Retail Banker</td>
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<td>Retail Bank Manager</td>
</tr>
<tr>
<td>Standard</td>
<td>Contact</td>
<td>Contact</td>
<td>Financial Services Retail Banking Layout</td>
<td>FINS Retail Layout</td>
<td>FINS Retail Layout</td>
<td>Retail Banker</td>
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<td>Retail Bank Manager</td>
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<tr>
<td>Object Type</td>
<td>Object</td>
<td>Specific Object (if any)</td>
<td>Landing Page (Layout Name)</td>
<td>Create Page (Layout Name)</td>
<td>Detail Page (Layout Name)</td>
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</tr>
<tr>
<td>Standard</td>
<td>Household</td>
<td>Not applicable</td>
<td>Financial Services Retail Banking Layout</td>
<td>FINS Retail Layout</td>
<td>CX FINS Vertical Layout</td>
<td>Retail Banker</td>
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<td>Retail Bank Manager</td>
</tr>
<tr>
<td>Standard</td>
<td>Opportunity</td>
<td>Not applicable</td>
<td>Financial Services Retail Banking Layout</td>
<td>FINS Retail Layout</td>
<td>FINS Retail Layout</td>
<td>Retail Banker</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Retail Bank Manager</td>
</tr>
<tr>
<td>Standard</td>
<td>Sales Lead</td>
<td>Not applicable</td>
<td>Financial Services Retail Banking Layout</td>
<td>FINS Retail Layout</td>
<td>FINS Retail Layout</td>
<td>Retail Banker</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Retail Bank Manager</td>
</tr>
<tr>
<td>Standard</td>
<td>Activity</td>
<td>Appointment</td>
<td>Financial Services Retail Banking Layout</td>
<td>FINS Retail Layout</td>
<td>FINS Retail Layout</td>
<td>Retail Banker</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Retail Bank Manager</td>
</tr>
<tr>
<td>Standard</td>
<td>Activity</td>
<td>Task</td>
<td>Financial Services Retail Banking Layout</td>
<td>FINS Retail Layout</td>
<td>FINS Retail Layout</td>
<td>Retail Banker</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Retail Bank Manager</td>
</tr>
<tr>
<td>Standard</td>
<td>Activity</td>
<td>Activities</td>
<td>Financial Services Retail Banking Layout</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Retail Banker</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Retail Bank Manager</td>
</tr>
<tr>
<td>Standard</td>
<td>Product</td>
<td>Not applicable</td>
<td>Financial Services Vertical Layout</td>
<td>Not applicable</td>
<td>FINS Retail Layout</td>
<td>Retail Banker</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Retail Bank Manager</td>
</tr>
<tr>
<td>Standard</td>
<td>Product</td>
<td>Not applicable</td>
<td>Financial Services Administrator Layout</td>
<td>FINS Retail Layout</td>
<td>FINS Retail Layout</td>
<td>Sales Admin for Financial Services</td>
</tr>
</tbody>
</table>

**Note:** 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.

### Adding 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 Sales Cloud using Administrator role.
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, Sales Admin for Financial Services, and Provision Manager roles. Provision Manager Role setup is applicable only for customers using Inheritance Management application.

   ✍️ 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 Sales Cloud Getting Started with Your Implementation guide. For more information on creating application users, see Oracle Sales Cloud Securing Oracle Sales Cloud guide.

**Related Topics**
- Importing Roles and Privileges into Security Console

---

**Assigning 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 Sales Cloud. For example, you can easily create a 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 Sales Cloud Extending Sales guide.

Using Application Composer, you can present the same Oracle Sales Cloud page to your users, but 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 Sales Cloud Extending Sales guide.

To assign a role to Commercial Banking Layout:

1. Sign in to Oracle Sales Cloud 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.

<table>
<thead>
<tr>
<th>Object Type</th>
<th>Object</th>
<th>Specific Object (if any)</th>
<th>Landing Page (Layout Name)</th>
<th>Create Page (Layout Name)</th>
<th>Detail Page (Layout Name)</th>
<th>Roles</th>
</tr>
</thead>
</table>
| 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
<p>|             |                 |                          |                            |                           |                           | Commercial Bank Manager |</p>
<table>
<thead>
<tr>
<th>Object Type</th>
<th>Object</th>
<th>Specific Object (if any)</th>
<th>Landing Page (Layout Name)</th>
<th>Create Page (Layout Name)</th>
<th>Detail Page (Layout Name)</th>
<th>Roles</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom</td>
<td>Transaction</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>FINS Retail Layout</td>
<td>FINS Retail Layout</td>
<td>Commercial Banker</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Commercial Bank Manager</td>
</tr>
<tr>
<td>Standard</td>
<td>Opportunity</td>
<td>Not applicable</td>
<td>Commercial Banking Layout</td>
<td>Commercial Banking Layout</td>
<td>Commercial Banking Layout</td>
<td>Commercial Banker</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Commercial Bank Manager</td>
</tr>
<tr>
<td>Standard</td>
<td>Sales Lead</td>
<td>Not applicable</td>
<td>Commercial Banking Layout</td>
<td>Commercial Banking Layout</td>
<td>Commercial Banking Layout</td>
<td>Commercial Banker</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Commercial Bank Manager</td>
</tr>
<tr>
<td>Standard</td>
<td>Product</td>
<td>Not applicable</td>
<td>Financial Services Vertical Layout</td>
<td>Not applicable</td>
<td>FINS Retail Layout</td>
<td>Commercial Banker</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Commercial Bank Manager</td>
</tr>
<tr>
<td>Standard</td>
<td>Product</td>
<td>Not applicable</td>
<td>Financial Services Administrator Layout</td>
<td>FINS Retail Layout</td>
<td></td>
<td>Sales Admin for Financial Services</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Standard</td>
<td>Activity</td>
<td>Appointment</td>
<td>Commercial Banking Layout</td>
<td>Commercial Banking Layout</td>
<td>Commercial Banking Layout</td>
<td>Commercial Banker</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Commercial Bank Manager</td>
</tr>
<tr>
<td>Standard</td>
<td>Activity</td>
<td>Task</td>
<td>Commercial Banking Layout</td>
<td>Commercial Banking Layout</td>
<td>Commercial Banking Layout</td>
<td>Commercial Banker</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Commercial Bank Manager</td>
</tr>
<tr>
<td>Standard</td>
<td>Activity</td>
<td>Activities</td>
<td>Commercial Banking Layout</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Commercial Banker</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Commercial Bank Manager</td>
</tr>
</tbody>
</table>
5 Renaming Account to Companies

Renaming 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 Sales Cloud using Application Implementation Consultant role.

   \textbf{Note:} Ensure that you are in a sandbox environment.

2. Navigate to Application Composer.
3. In Standard Objects, select \textbf{Account Object}.
4. Click \textbf{Edit} button to edit the Account Object.
5. Specify \textbf{Singular Label} as \textbf{Company} and \textbf{Plural Label} as \textbf{Companies} and save.
6. Publish the sandbox.
7. Create a new sandbox.
8. On the Navigator, in Tools, click \textbf{User Interface Text}.
9. Click \textbf{Search and Replace} button.
10. Select all values for \textbf{Include in search}.
11. Select \textbf{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 are not specified, do not enter any value.

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

<table>
<thead>
<tr>
<th>Search for (Singular Value)</th>
<th>Search for (Plural Value)</th>
<th>Replace with (Singular Value)</th>
<th>Replace with (Plural Value)</th>
<th>Include Remarks: User Interface Text Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create Account</td>
<td>Not applicable</td>
<td>Create Company</td>
<td>Not applicable</td>
<td>Include only the following string:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>- Header for Create Organization Account page.</td>
</tr>
</tbody>
</table>

<p>| Edit Account                | Not applicable            | Edit Company                 | Not applicable              | Include only the following string:     |
|                             |                           |                              |                             | - Header for the Edit Account page.    |</p>
<table>
<thead>
<tr>
<th>Search for (Singular Value)</th>
<th>Search for (Plural Value)</th>
<th>Replace with (Singular Value)</th>
<th>Replace with (Plural Value)</th>
<th>Include Remarks: User Interface Text Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Delete Account</td>
<td>Not applicable</td>
<td>Delete Company</td>
<td>Not applicable</td>
<td>Include only the following strings:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>◦ Delete an account upon viewing the account’s profile information.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>◦ Action on the Account Profile page that deletes the account.</td>
</tr>
<tr>
<td>Not applicable</td>
<td>My Accounts</td>
<td>Not applicable</td>
<td>My Companies</td>
<td>Include all values.</td>
</tr>
<tr>
<td>Parent Account</td>
<td>Not applicable</td>
<td>Parent Company</td>
<td>Not applicable</td>
<td>Include only the following string:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>◦ Parent account assignment to an existing account creating the hierarchy tree.</td>
</tr>
<tr>
<td>Select: Account</td>
<td>Not applicable</td>
<td>Select: Company</td>
<td>Not applicable</td>
<td>Include all values.</td>
</tr>
<tr>
<td>Create Account Hierarchy</td>
<td>Not applicable</td>
<td>Create Company Hierarchy</td>
<td>Not applicable</td>
<td>Include all values.</td>
</tr>
<tr>
<td>Not applicable</td>
<td>Accounts</td>
<td>Not applicable</td>
<td>Companies</td>
<td>Include only the following string:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>◦ Lists all accounts for your organization.</td>
</tr>
<tr>
<td>Account</td>
<td>Not applicable</td>
<td>Company</td>
<td>Not applicable</td>
<td>Include only the following strings:</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>◦ Account name</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>◦ Label of the field that specifies the name of the customer account.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>◦ Account for customer associated with the task.</td>
</tr>
</tbody>
</table>

**Note:** n/a is also a value for description.
### Renaming Account to Companies

<table>
<thead>
<tr>
<th>Search for (Singular Value)</th>
<th>Search for (Plural Value)</th>
<th>Replace with (Singular Value)</th>
<th>Replace with (Plural Value)</th>
<th>Include Remarks: User Interface Text Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>○ Label for the account name on the service request.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ Customer account of an opportunity.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ Search results label for Account.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ Label displaying the name of the opportunity.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ Indicates the ticket account.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ Name of the account related to the activity.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ Title for the Account tab on the Edit Opportunity page</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ Name of the account on the lead.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ Label of the field displaying opportunity account.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ A label on the simplified UI that provides the name of the customer type.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>○ n/a</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 Enabling the Service Offering

Enabling Functional Areas in the Service Offering: Explained

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

To enable the Service offering:

1. Sign in as an administrator or a setup user.
2. Click Navigator > My Enterprise > Offerings work area.
3. On the Offerings page, select the Service 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 function area of the Service offering is enabled.

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

Page Composer is a configuration tool using which you can configure your pages. For more information on page composer, see Oracle Sales Cloud Extending Sales 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 is supported by Oracle Sales Cloud for Financial Services. Perform the following steps only if you want to configure the Springboard and Navigator to hide the Lightbox icon.

Hiding Lightbox Icon on Welcome Springboard

Following are the steps:

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

   \(\text{Note:}\) Ensure that you are 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.

Hiding Dashboard Icon on Welcome Springboard

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

1. Sign in to Oracle Sales Cloud 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 is not No.

6. Click Save and Close.
Enabling Households Icon on Navigator and Welcome Springboard

Households is not available by default in Oracle Sales Cloud for Financial Services. You must enable it for usage in Oracle Sales Cloud for Financial Services.

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

1. Sign in to Oracle Sales Cloud 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**.

Hiding Companies Icon on Navigator and Welcome Springboard for Retail Banking

**Companies** is available by default in Oracle Sales Cloud for Financial Services. If you intend to, you can hide it for Retail Banker and Retail Bank Manager in Oracle Sales Cloud for Financial Services.

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

1. Sign in to Oracle Sales Cloud 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_MANAGERJOB']}

   For example, if 
   
   ```#{((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_MANAGERJOB'])
   ```
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 Configuring Reporting and Analytics

Configuring KPI Dashboard for Retail Banking

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

Configuring 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 Sales Cloud using Sales Administrator role.
2. Click Customize Work Area Pages link available next to the Sign Out link.

   ✍️ 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. Delete any existing infolets by selecting Delete option in Actions for each infolet.
7. Click the Infolet Repository icon and select Create Infolet option.

   Choose the following options:

   - Infolet Title: According to the following table.
   - Dimension: 1 x 1
   - Back View: No
   - 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.

<table>
<thead>
<tr>
<th>Title</th>
<th>Detailed Report</th>
<th>Infolet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actuals vs Quota</td>
<td>Reports and Analytics/BIPresentationServer/Shared Folders/Extension/orafs/Retail Banking/KPI Dashboard/Dashboards/Actuals vs Quota Dashboard for Retail Bank Manager</td>
<td>Reports and Analytics/BIPresentationServer/Shared Folders/Extension/orafs/Retail Banking/KPI Dashboard/Actuals vs Quota Tile for Retail Bank Manager</td>
</tr>
</tbody>
</table>
Configuring 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 Sales Cloud using Sales Administrator role.
2. Click **Customize Work Area Pages** link available next to the **Sign Out** link.
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. Delete any existing infolets by selecting Delete option in Actions for each infolet.
7. Click the Infolet Repository icon and select Create Infolet option.

Choose the following options:
- Infolet Title: According to the following table.
- Dimension: 1 x 1
- Back View: No
- 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.

<table>
<thead>
<tr>
<th>Title</th>
<th>Detailed Report</th>
<th>Infolet</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actuals vs Quota</td>
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<td>Reports and Analytics/BIPresentationServer/Shared Folders/Extension/orafs/Retail Banking/KPI Dashboard/Top Loans Tile for Retail Manager</td>
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<td>Retail Banking/KPI Dashboard/ Dashboards/Push Application Dashboard for Retail Bank Manager</td>
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Configuring 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 Sales Cloud using Sales Administrator role.
2. Click **Customize Pages** link available next to the **Sign Out** link.

   **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. Delete any existing infolets by selecting **Delete** option in **Actions** for each infolet.
6. Click the **Infolet Repository** icon and select **Create Infolet** option.

   Choose the following options:

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

<table>
<thead>
<tr>
<th>Roles</th>
<th>Title</th>
<th>Dimension</th>
<th>Detailed Report</th>
<th>Infolet</th>
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Changing 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:

Removing 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.

<table>
<thead>
<tr>
<th>User</th>
<th>Detailed Report</th>
<th>Infolet</th>
<th>Filter</th>
</tr>
</thead>
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<tr>
<td>Retail Banker</td>
<td>/Shared Folders/Extension/orafs/Retail Banking/KPI Dashboard/Retail Bank Manager Pipeline</td>
<td>/Shared Folders/Extension/orafs/Retail Banking/KPI Dashboard/Retail Bank Manager Pipeline</td>
<td>Pipeline Filter</td>
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<td>Retail Bank Manager</td>
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<tr>
<td>Commercial Banker</td>
<td>/Shared Folders/Extension/orafs/Commercial Banking/KPI Dashboards/Detail Reports/Loan Pipeline Detail</td>
<td>/Shared Folders/Extension/orafs/Commercial Banking/KPI Dashboards/Infolet Tiles/Loan Pipeline Detail</td>
<td>Commercial Loans Sales Method Filter</td>
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<td>Commercial Bank Manager</td>
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Creating 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.
Configuring Sales Organization as the Inventory Organization

Oracle Policy Automation 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 Sales Cloud for Financial Services, business unit and internal organization for BU (created by default 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 Sales Cloud based on the information that you provided after signing in to Oracle Sales Cloud.

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

1. Sign in to Oracle Sales Cloud using Application Implementation Consultant role.
2. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Company Profile
   - 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 does not 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 is not displayed, then create a new profile value in the HZ_DEFAULT_BU_CRM: Profile Values section or the HZ_ENABLE_MULTIPLE_BU_CRM: Profile Values section by selecting 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 does not 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 is 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 is not displayed, then create a new profile value for the Profile Option: Profile Values section by selecting New for Actions drop-down list.

6. For the Profile Level drop-down list, select Site.

7. For Profile Value, select value that is same 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.
Setting Up Oracle Policy Automation Interview

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

Preparing Oracle Policy Automation Interviews for Financial Services

Seven Oracle Policy Automation interview projects are provided with Oracle Sales Cloud for Financial Services. These projects are designed to provide decision making advice as part of the Needs Analysis feature that is easy to change and maintain to meet the needs of your organization. Using Oracle Policy Modeling, prepare these seven projects to work with your specific Oracle Sales Cloud implementation.


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 Oracle Policy Automation Hub URL, Hub User name, and Password. Provide the information and sign in to the hub.

5. Select the connection created on Oracle Policy Automation Hub and click **OK**. For more information on creating the connection, see the topic Setting Up Oracle Policy Automation Interviews in Oracle Sales Cloud: Overview listed in the Related Topics section in this topic.

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://<SALES_CLOUD_CRM_HOST_NAME>/crmUI/faces/CrmFusionHome?
   isFuseTF=Y&tabToOpen=MOO_OPPTYMGMTOPPORTUNITIES_CRM&cardToOpen=MOO_OPPTYMGMTOPPORTUNITIES_%OptyId%
The SALES_CLOUD_CRM_HOST_NAME can be obtained from the sales cloud application URL, for example, if https://fuscdrmsmc318-fa-ext.us.oracle.com/crmUI/faces/ is the sales cloud URL, the SALES_CLOUD_CRM_HOST_NAME would be fuscdrmsmc318-fa-ext.us.oracle.com and so in the preceding example, the URL would be https://fuscdrmsmc318-fa-ext.us.oracle.com/crmUI/faces/CrmFusionHome?isFuseTF=Y&tabToOpen=MOO_OPPTYMGMTOPPORTUNITIES_CRM&cardToOpen=MOO_OPPTYMGMTOPPORTUNITIES_CRM_CARD&TF_subTabName=Summary&TF_skipToEditOptyId=%OptyId%

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 SALES_CLOUD_CRM_HOST_NAME obtained from step 8. Assign the host name to Env.Url variable in the rule document, for example, fuscdrmsmc318-fa-ext.us.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://<SALES_CLOUD_CRM_HOST_NAME>/crmUI/faces/CrmFusionHome?isFuseTF=Y&cardToOpen=MKL_LEADS&TF_subTabName=SUMMARY&TF_LeadId=%LeadId%

The SALES_CLOUD_CRM_HOST_NAME can be obtained from the sales cloud application URL, for example, if https://fuscdrmsmc318-fa-ext.us.oracle.com/crmUI/faces/CrmFusionHome is the sales cloud URL, the SALES_CLOUD_CRM_HOST_NAME would be fuscdrmsmc318-fa-ext.us.oracle.com and so in the above example, the URL would be https://fuscdrmsmc318-fa-ext.us.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 SALES_CLOUD_CRM_HOST_NAME obtained from step 8. Assign the host name to Env.Url variable in the rule document, for example, fuscdrmsmc318-fa-ext.us.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, or 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 SALES_CLOUD_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.us.oracle.com/crmUI/faces/CrmFusionHome is the sales cloud URL, the SALES_CLOUD_CRM_HOST_NAME would be fuscdrmsmc318-fa-ext.us.oracle.com and so in the above example, the URL would be https://fuscdrmsmc318-fa-ext.us.oracle.com

   c. Click Validate button on the Policy Modeling word toolbar.

   d. Save and close the rule document.
Deploying Oracle Policy Automation 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 Sales Cloud 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 Oracle Policy Automation Hub and change the Deployment Name as specified in the following table:

<table>
<thead>
<tr>
<th>Interview Name</th>
<th>Deployment Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Interview</td>
<td>R13 Opportunity Interview</td>
</tr>
<tr>
<td>Lead interview</td>
<td>R13 Lead Interview</td>
</tr>
<tr>
<td>Contact Interview</td>
<td>R13 Contact Interview</td>
</tr>
<tr>
<td>Household Interview</td>
<td>R13 Household Interview</td>
</tr>
<tr>
<td>Opportunity Commercial Banking</td>
<td>R13 Opportunity Commercial Banking Interview</td>
</tr>
<tr>
<td>Lead Commercial Banking Interview</td>
<td>R13 Lead Commercial Banking Interview</td>
</tr>
<tr>
<td>Account Commercial Banking Interview</td>
<td>R13 Account Commercial Banking Interview</td>
</tr>
</tbody>
</table>

The interview is deployed on Oracle Policy Automation Hub.

3. Access the interview by navigating to Deployments tab on Oracle Policy Automation Hub.
4. Follow the steps from 2 to 13 of the Preparing Oracle Policy Automation Interviews for Financial Services section, steps 1 and 2 of the Deploying Oracle Policy Automation Interviews for Financial Services section.
5. Sign in to Oracle Policy Automation 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 Oracle Policy Automation Interviews for Financial Services section with the deployment names provided in the table.
7. In the Setup and Maintenance work area, go to the following:
   - Functional Area: Application Extensions
   - 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.

<table>
<thead>
<tr>
<th>Application Name</th>
<th>Full URL</th>
<th>Partner Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>OPA_Opportunity_Interview</td>
<td>&lt;R13 Opportunity Interview URL&gt;</td>
<td>OPA</td>
</tr>
</tbody>
</table>
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.

```groovy
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.

```groovy
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+jwt=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 `getLeadOPAUrl` 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:

   ```groovy
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 `getContactOPAUrl` 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:

   ```groovy
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 `getHouseholdOPAUrl` 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:

   ```groovy
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 `getAccountOPAUrl` and select **Return Type** as `String`.
6. Save and close the object function.

**Related Topics**

- Collaterals for Oracle Sales Cloud for Financial Services
- Deploy and activate a project
- Setting up Oracle Policy Automation Interviews in Oracle Sales Cloud: Overview
Chapter 11

11 Configuring Open Authorization

Configuring Open Authorization for Oracle Policy Automation Integration

You must configure the open authorization (OAUTH) for Oracle Policy Automation integration to perform opportunity need analysis in Oracle Sales Cloud for Financial Services. This configuration helps the Sales Cloud user to authenticate the Oracle Policy Automation connector operation instead of using the sales_admin user role by default.

![Note: Username on the Connection page must be sales_admin by default to load the metadata required for interview.](Image)

To configure OAUTH in Oracle Policy Automation connector:

2. Navigate to Connections.
3. Open the Oracle Policy Automation 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 Configuring Item Types

Configuring Item Types Required for Needs Analysis

Product Type is a field in the Product Object for classifying different products. This field is also used in the recommendation rules for Oracle Policy Automation 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 Oracle Policy Automation Needs Analysis to work.

1. Sign in to Oracle Sales Cloud using Sales Administrator role.
2. In the Setup and Maintenance work area, go to the following:
   - Functional Area: Application Extensions
   - 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 Setting Up Profile Option

Setting Up Profile Option for Creating Customer Relationship Management Product

When you create a customer relationship management product in Oracle Sales Cloud, 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 Sales Cloud using Sales Administrator role.
2. In the Setup and Maintenance work area, go to the following:
   - Functional Area: Application Extensions
   - Task: Manage Administrator Profile Value
4. Add profile values at site or user level. You can select the item organization in which you want to create items.
14 Configuring File Import and Export

Configuring File Import and Export

You must configure file import and export setup for importing and exporting files in Oracle Sales Cloud 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.
Configuring Sales Processes

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

To configure sales processes:

1. Sign in to Oracle Sales Cloud using Administrator role.
2. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - 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:
   - Offering: Sales
   - Functional Area: Opportunities
   - 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. By default, Retail Banking is the Retail Banking Sales Stage and Commercial Loans is the Commercial Banking Sales Stage.
8. Click Save and Close.

Since 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.

<table>
<thead>
<tr>
<th>Sales Method</th>
<th>Description</th>
<th>Sales Stage Name</th>
<th>Phase</th>
<th>Status</th>
<th>Order</th>
<th>Quota Factor</th>
<th>Win Probability</th>
<th>Duration</th>
<th>Stalled Deal Limit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Commercial Loans</td>
<td>Not applicable</td>
<td>Loan purpose evaluation</td>
<td>A</td>
<td>Open</td>
<td>1</td>
<td>3.5</td>
<td>10</td>
<td>5</td>
<td>800</td>
</tr>
<tr>
<td>Commercial Loans</td>
<td>Not applicable</td>
<td>Company Visit Completed</td>
<td>B</td>
<td>Open</td>
<td>2</td>
<td>3</td>
<td>20</td>
<td>4</td>
<td>800</td>
</tr>
<tr>
<td>Commercial Loans</td>
<td>Not applicable</td>
<td>Credit Check</td>
<td>B</td>
<td>Open</td>
<td>3</td>
<td>2.8</td>
<td>30</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Sales Method</td>
<td>Description</td>
<td>Sales Stage Name</td>
<td>Phase</td>
<td>Status</td>
<td>Order</td>
<td>Quota Factor</td>
<td>Win Probability</td>
<td>Duration</td>
<td>Stalled Deal Limit</td>
</tr>
<tr>
<td>-------------------</td>
<td>---------------------------------</td>
<td>---------------------------</td>
<td>-------</td>
<td>--------</td>
<td>-------</td>
<td>--------------</td>
<td>-----------------</td>
<td>----------</td>
<td>-------------------</td>
</tr>
<tr>
<td>Commercial Loans</td>
<td>Not applicable</td>
<td>Research Analysis</td>
<td>B</td>
<td>Open</td>
<td>4</td>
<td>2.5</td>
<td>40</td>
<td>4</td>
<td>800</td>
</tr>
<tr>
<td>Commercial Loans</td>
<td>Not applicable</td>
<td>Deal Structured</td>
<td>B</td>
<td>Open</td>
<td>5</td>
<td>2.2</td>
<td>50</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Commercial Loans</td>
<td>Not applicable</td>
<td>Draft Deal generated</td>
<td>B</td>
<td>Open</td>
<td>6</td>
<td>2</td>
<td>60</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Commercial Loans</td>
<td>Not applicable</td>
<td>Deal Committee</td>
<td>B</td>
<td>Open</td>
<td>7</td>
<td>1.8</td>
<td>70</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Commercial Loans</td>
<td>Not applicable</td>
<td>Final Negotiation</td>
<td>B</td>
<td>Open</td>
<td>8</td>
<td>1.5</td>
<td>80</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Commercial Loans</td>
<td>Not applicable</td>
<td>Underwriting Contract</td>
<td>C</td>
<td>Open</td>
<td>9</td>
<td>1.3</td>
<td>85</td>
<td>3</td>
<td>800</td>
</tr>
<tr>
<td>Commercial Loans</td>
<td>Not applicable</td>
<td>Contract Signature</td>
<td>C</td>
<td>Open</td>
<td>10</td>
<td>1.2</td>
<td>95</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Commercial Loans</td>
<td>Not applicable</td>
<td>Loan Fulfilled</td>
<td>C</td>
<td>Won</td>
<td>11</td>
<td>1</td>
<td>100</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Equipment Finance</td>
<td>Not applicable</td>
<td>Equipment Evaluation</td>
<td>A</td>
<td>Open</td>
<td>1</td>
<td>3.5</td>
<td>10</td>
<td>5</td>
<td>800</td>
</tr>
<tr>
<td>Equipment Finance</td>
<td>Not applicable</td>
<td>Field Visit Completed</td>
<td>B</td>
<td>Open</td>
<td>2</td>
<td>3</td>
<td>20</td>
<td>4</td>
<td>800</td>
</tr>
<tr>
<td>Equipment Finance</td>
<td>Not applicable</td>
<td>Credit Check</td>
<td>B</td>
<td>Open</td>
<td>3</td>
<td>2.8</td>
<td>30</td>
<td>2</td>
<td>800</td>
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<td>2.5</td>
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<td>4</td>
<td>800</td>
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<td>Equipment Finance</td>
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<td>Deal Structured</td>
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<td>Open</td>
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<td>2.2</td>
<td>50</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Equipment Finance</td>
<td>Not applicable</td>
<td>Draft Deal generated</td>
<td>B</td>
<td>Open</td>
<td>6</td>
<td>2</td>
<td>60</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Equipment Finance</td>
<td>Not applicable</td>
<td>Deal Committee</td>
<td>B</td>
<td>Open</td>
<td>7</td>
<td>1.8</td>
<td>70</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Equipment Finance</td>
<td>Not applicable</td>
<td>Final Negotiation</td>
<td>B</td>
<td>Open</td>
<td>8</td>
<td>1.5</td>
<td>80</td>
<td>2</td>
<td>800</td>
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<td>Sales Method</td>
<td>Description</td>
<td>Sales Stage Name</td>
<td>Phase</td>
<td>Status</td>
<td>Order</td>
<td>Quota Factor</td>
<td>Win Probability</td>
<td>Duration</td>
<td>Stalled Deal Limit</td>
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<tr>
<td>--------------</td>
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<td>-----------------</td>
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<td>--------------------</td>
</tr>
<tr>
<td>Equipment Finance</td>
<td>Not applicable</td>
<td>Underwriting Contract</td>
<td>C</td>
<td>Open</td>
<td>9</td>
<td>1.3</td>
<td>85</td>
<td>3</td>
<td>800</td>
</tr>
<tr>
<td>Equipment Finance</td>
<td>Not applicable</td>
<td>Contract Signature</td>
<td>C</td>
<td>Open</td>
<td>10</td>
<td>1.2</td>
<td>95</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Equipment Finance</td>
<td>Not applicable</td>
<td>Loan Fulfilled</td>
<td>C</td>
<td>Won</td>
<td>11</td>
<td>1</td>
<td>100</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Retail Banking</td>
<td>Not applicable</td>
<td>Pre-Qualification</td>
<td>A - Qualification and discovery</td>
<td>Open</td>
<td>1</td>
<td>3.5</td>
<td>10</td>
<td>5</td>
<td>800</td>
</tr>
<tr>
<td>Retail Banking</td>
<td>Not applicable</td>
<td>Property Verification</td>
<td>B - Working on the deal</td>
<td>Open</td>
<td>2</td>
<td>3</td>
<td>20</td>
<td>4</td>
<td>800</td>
</tr>
<tr>
<td>Retail Banking</td>
<td>Not applicable</td>
<td>Due-Diligence Check</td>
<td>B - Working on the deal</td>
<td>Open</td>
<td>3</td>
<td>2.8</td>
<td>30</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Retail Banking</td>
<td>Not applicable</td>
<td>Research Analysis</td>
<td>B - Working on the deal</td>
<td>Open</td>
<td>4</td>
<td>2.5</td>
<td>40</td>
<td>4</td>
<td>800</td>
</tr>
<tr>
<td>Retail Banking</td>
<td>Not applicable</td>
<td>Deal Structured</td>
<td>B - Working on the deal</td>
<td>Open</td>
<td>5</td>
<td>2.2</td>
<td>50</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Retail Banking</td>
<td>Not applicable</td>
<td>Draft Deal generated</td>
<td>B - Working on the deal</td>
<td>Open</td>
<td>6</td>
<td>2</td>
<td>60</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Retail Banking</td>
<td>Not applicable</td>
<td>Deal Committee</td>
<td>B - Working on the deal</td>
<td>Open</td>
<td>7</td>
<td>1.8</td>
<td>70</td>
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<tr>
<td>Retail Banking</td>
<td>Not applicable</td>
<td>Final Negotiation</td>
<td>B - Working on the deal</td>
<td>Open</td>
<td>8</td>
<td>1.5</td>
<td>80</td>
<td>2</td>
<td>800</td>
</tr>
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<td>Sales Method</td>
<td>Description</td>
<td>Sales Stage Name</td>
<td>Phase</td>
<td>Status</td>
<td>Order</td>
<td>Quota Factor</td>
<td>Win Probability</td>
<td>Duration</td>
<td>Stalled Deal Limit</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------</td>
<td>------------------</td>
<td>-------------</td>
<td>--------</td>
<td>-------</td>
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<td>------------------</td>
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<td>-------------------</td>
</tr>
<tr>
<td>Retail Banking</td>
<td>Not applicable</td>
<td>Underwriting Contract</td>
<td>C - Closing</td>
<td>Open</td>
<td>9</td>
<td>1.3</td>
<td>85</td>
<td>3</td>
<td>800</td>
</tr>
<tr>
<td>Retail Banking</td>
<td>Not applicable</td>
<td>Contract Signature</td>
<td>C - Closing</td>
<td>Open</td>
<td>10</td>
<td>1.2</td>
<td>95</td>
<td>2</td>
<td>800</td>
</tr>
<tr>
<td>Retail Banking</td>
<td>Not applicable</td>
<td>Loan Fulfilled</td>
<td>C - Closing</td>
<td>Won</td>
<td>11</td>
<td>1</td>
<td>100</td>
<td>2</td>
<td>800</td>
</tr>
</tbody>
</table>
16 Understanding Role-Based Security

Understanding Role-Based Access and Security Considerations

Oracle Sales Cloud implements role-based access control (RBAC) to prevent unauthorized access to application resources. Users gain access to application functions and data when they are 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 are not assigned directly to users. You can assign job and abstract roles to a user manually, when you create the user, or automatically, by creating 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 Sales Cloud data and functions, see Oracle Sales Cloud Securing Oracle Sales Cloud 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.

<table>
<thead>
<tr>
<th>Object</th>
<th>Application</th>
<th>Retail Banker</th>
<th>Retail Bank Manager</th>
<th>Commercial Banker</th>
<th>Commercial Bank Manager</th>
<th>Sales Admin for Financial Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Account</td>
<td>Common</td>
<td>View</td>
<td>View</td>
<td>View</td>
<td>View</td>
<td>Full</td>
</tr>
<tr>
<td></td>
<td></td>
<td>View All</td>
<td>View All</td>
<td>View All</td>
<td>View All</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Update</td>
<td>Update</td>
<td>Update</td>
<td>Update</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Update All</td>
<td>Update All</td>
<td>Update All</td>
<td>Update All</td>
<td></td>
</tr>
<tr>
<td>Transaction</td>
<td>Common</td>
<td>View</td>
<td>View</td>
<td>View</td>
<td>View</td>
<td>Full</td>
</tr>
<tr>
<td></td>
<td></td>
<td>View All</td>
<td>View All</td>
<td>View All</td>
<td>View All</td>
<td></td>
</tr>
<tr>
<td>Fin Account Contact</td>
<td>Common</td>
<td>View</td>
<td>View</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Full</td>
</tr>
<tr>
<td></td>
<td></td>
<td>View All</td>
<td>View All</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Update</td>
<td>Update</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Update All</td>
<td>Update All</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Understanding Role-Based Security

<table>
<thead>
<tr>
<th>Object</th>
<th>Application</th>
<th>Retail Banker</th>
<th>Retail Bank Manager</th>
<th>Commercial Banker</th>
<th>Commercial Bank Manager</th>
<th>Sales Admin for Financial Services</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Summary</td>
<td>Common</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
<td>Full</td>
</tr>
<tr>
<td>Daily Balance</td>
<td>Common</td>
<td>View</td>
<td>View</td>
<td>View</td>
<td>View</td>
<td>Full</td>
</tr>
<tr>
<td></td>
<td></td>
<td>View All</td>
<td>View All</td>
<td>View All</td>
<td>View All</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Update</td>
<td>Update</td>
<td>Update</td>
<td>Update</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Update All</td>
<td>Update All</td>
<td>Update All</td>
<td>Update All</td>
<td></td>
</tr>
<tr>
<td>Case</td>
<td>Common</td>
<td>Full</td>
<td>Full</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Full</td>
</tr>
<tr>
<td>CaseToContact</td>
<td>Common</td>
<td>Full</td>
<td>Full</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Full</td>
</tr>
<tr>
<td>CaseToResource</td>
<td>Common</td>
<td>Full</td>
<td>Full</td>
<td>Not applicable</td>
<td>Not applicable</td>
<td>Full</td>
</tr>
</tbody>
</table>

For information on how you implement and manage users and roles in Oracle Sales Cloud, see Oracle Sales Cloud Getting Started with Implementation guide.
Creating a Job Role for Assigning to Newly Provisioned Contacts for Case

You must create a job role and assign it to the newly provisioned contacts for case to work with retail banking features.

To create a job role for assigning to newly provisioned contacts for case:

1. Sign in to Oracle Sales Cloud using Administrator role.
3. In the Roles subtab, click Create Role button.
4. Enter the Basic Information as defined in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Name</td>
<td>Sales Contact User</td>
</tr>
<tr>
<td>Role Code</td>
<td>OSC_CUSTOMER_CONTACT_JOB</td>
</tr>
<tr>
<td>Role Category</td>
<td>CRM - Job Roles</td>
</tr>
</tbody>
</table>

6. Click Add Function Security Policy.
7. In the Search drop-down list, select Privileges and search for Use REST Services for Inheritance Management.

The search displays the privilege.

8. Click Add Privilege to Role.

Confirmation dialog box is displayed.

9. Click OK.
11. Click Summary and Impact Report train stop.

Create Role Sales Contact User: Summary and Impact Report is displayed.
12. Click Save and Close.
Adding Case Object View Access to the Newly Created Custom Role

You can view case objects using a newly created custom role by providing the view access to the newly created custom role.

To add case object view access to the newly created custom role:

1. Sign in to Oracle Sales Cloud using Administrator role.
2. Click Manage Sandboxes link next to the Sign Out link to create and use sandbox environment.

   **Note:** Ensure that you are in a sandbox environment.

3. Navigate to Application Composer.
4. Expand Custom.
5. Expand Case.
6. Click Security.
7. Select View check box for Sales Contact User.
8. Click Save.
9. Expand CaseToContact child object of Case Object.
10. Click Security.
11. Select View check box for Sales Contact User.
12. Expand CaseToResource child object of Case Object.
13. Click Security.
14. Select View check box for Sales Contact User.
15. Click Save.

Adding Data Security Policies to the Newly Created Custom Role

Following are the newly created custom roles that must have various policies such as functional and data security policies created and assigned to them:

- HZ_PARTIES
- __ORAFS__Cases_c
- ZMM_ACTY_ACTIVITIES
- ZMM_NOTES
- __ORAFS__CaseToContact_c
- __ORAFS__CaseToResource_c
- FND_LOOKUP_TYPES

To add data security policies to the newly created custom role:
HZ_PARTIES

1. Sign in to Oracle Sales Cloud using Administrator role.
3. In the Administration subtab, click Manage Database Resources.
4. In the Search section, enter HZ_PARTIES in the Object Name field and click Search.
5. Click Edit in Search Results to open Edit Data Security: HZ_PARTIES page.
6. Click Condition tab and click the Create icon to open the Create Database Resource Condition dialog box.
7. Enter the name in the Name field for the resource condition as HZPARTIESCASE1.
8. Enter the display name of the condition in the Display Name field as Access case related contacts and resources.
9. For Condition Type, select the option SQL Predicate.
10. In the SQL Predicate field, enter the following predicate condition:

   $(TABLE_ALIAS.party_id = hz_session_util.get_user_partyid) or $(TABLE_ALIAS.party_id in (select extn_Attribute_number001 from hz_ref_entities where attribute_category='__ORAFS__Cases_c' and id in (select source_id1 from hz_ref_entities_xmm where target_id1 =hz_session_util.get_user_partyid)) or $(TABLE_ALIAS.PARTY_ID IS NULL) or $(TABLE_ALIAS.party_id in (select party_id from jtf_rs_resource_profiles where RESOURCE_PROFILE_ID IN (SELECT TARGET_ID1 FROM HZ_REF_ENTITIES_XMM WHERE SOURCE_ID1 IN (SELECT SOURCE_ID1 from HZ_REF_ENTITIES_XMM WHERE TARGET_ID1=hz_session_util.get_user_partyid)))))

11. Click Save to close the Create Database Resource Condition dialog box.
13. Click Policy tab and click the Create icon to open the Create Policy dialog box.
14. Click General Information tab and enter the name of the policy in the Name field as Grant on Trading Community Party for Case.
15. Select the current date using Select Date for the Start Date field.
16. Click the Role tab, click Add to open Select and Add: Roles dialog box.
17. For Choose a Role Type, choose the Application Role option.
18. Enter role name as OSC_CUSTOMER_CONTACT_JOB for the Role Name field. OSC indicates Sales Contact User. Select the option crm for the Application field. Click Search.
19. Select Sales Contact User in the search results. Click Apply. Click OK to close the Select and Add: Roles dialog box.
20. Click Rule tab and select Multiple Values option for the Row Set field.
21. For the Condition field, click Search to open the Pick a Set of Database Row dialog box.
22. Select the Access case related contacts and resources option and click OK.
23. Click the Action tab and from the set of Available Actions, select Read and move it to the Selected Actions box.
24. Click Save and Close to close the Create Policy dialog box.
25. Click Save and then click Submit on the Edit Data Security: HZ_PARTIES page.
26. Click Done.

__ORAFS__Cases_c

1. Sign in to Oracle Sales Cloud using Administrator role.
3. In the Administration subtab, click Manage Database Resources.
4. In the Search section, enter __ORAFS__CASES in the Object Name field and click Search.
5. Click Edit in Search Results to open Edit Data Security: __ORAFS__Cases_c page.
6. Click Condition tab and click the Create icon to open the Create Database Resource Condition dialog box.
7. Enter the name in the Name field for the resource condition as HZREFENTITIESCASE1.
8. Enter the display name of the condition in the **Display Name** field as **Access case related to Sales Contact User**.
9. For **Condition Type**, select the option **SQL Predicate**.
10. In the **SQL Predicate** field, enter the following predicate condition:
    
    ```sql
    &TABLE_ALIAS.ID IN (select source_id1 from fusion.hz_ref_entities_xmm where target_id1 = hz_session_util.get_user_partyid)
    ```
11. Click **Save** to close the Create Database Resource Condition dialog box.
12. Click **Save** on the Edit Data Security: __ORAFS__Cases_c page.
13. Click Policy tab and click the **Create** icon to open the Create Policy dialog box.
14. Click General Information tab and enter the name of the policy in the **Name** field as **Grant on __ORAFS__Cases_c**.
15. Select the current date using **Select Date** for the **Start Date** field.
16. Click the Role tab, click **Add** to open Select and Add: Roles dialog box.
17. For **Choose a Role Type**, choose the **Application Role** option.
18. Enter role name as **OSC_CUSTOMER_CONTACT_JOB** for the **Role Name** field. **OSC** indicates Sales Contact User. Select the option **crm** for the **Application** field. Click **Search**.
19. Select **Sales Contact User** in the search results. Click **Apply**. Click **OK** to close the Select and Add: Roles dialog box.
20. Click Rule tab and select **Multiple Values** option for the **Row Set** field.
21. For the **Condition** field, click the **Search** icon to open the Pick a Set of Database Row dialog box.
22. Select the **Access case related to Sales Contact User** option and click **OK**.
23. Click the Action tab and from the set of **Available Actions**, select **Read** and move it to the **Selected Actions** box.
24. Click **Save and Close** to close the Create Policy dialog box.
25. Click the **Create** icon to open the Create Policy dialog box.
26. Click General Information tab and enter the name of the policy in the **Name** field as **Grant on __ORAFS__Cases_c**.
27. Select the current date using **Select Date** for the **Start Date** field.
28. Click the Role tab, click **Add** to open Select and Add: Roles dialog box.
29. For **Choose a Role Type**, choose the **Application Role** option.
30. Enter role name as **OSC_CUSTOMER_CONTACT_JOB** for the **Role Name** field. **OSC** indicates Sales Contact User. Select the option **crm** for the **Application** field. Click **Search**.
31. Select **Sales Contact User** in the search results. Click **Apply**. Click **OK** to close the Select and Add: Roles dialog box.
32. Click Rule tab and select **Functional Grant** option for the **Row Set** field.
33. Click the Action tab and from the set of **Available Actions**, select **Read** and move it to the **Selected Actions** box.
34. Click **Save and Close** to close the Create Policy dialog box.
35. Click **Save** and then click **Submit** on the Edit Data Security: __ORAFS__Cases_c page.
36. You can close the Edit Data Security: __ORAFS__Cases_c page.

**ZMM_ACTY_ACTIVITIES**

1. Sign in to Oracle Sales Cloud using Administrator role.
2. On the Navigator, in Tools, click **Security Console**.
3. In the Administration subtab, click **Manage Database Resources**.
4. In the Search section, enter **ZMM_ACTY_ACTIVITIES** in the **Object Name** field and click **Search**.
5. Click **Edit** in **Search Results** to open Edit Data Security: ZMM_ACTY_ACTIVITIES page.
6. Click Condition tab and click the **Create** icon to open the Create Database Resource Condition dialog box.
7. Enter the name in the **Name** field with the resource condition as **ZMMACTYACTIVITIES1**.
8. Enter the display name of the condition in the **Display Name** field as **Access activities related to Sales Contact User**.
9. For **Condition Type**, select the option **SQL Predicate**.
10. In the SQL Predicate field, enter the following predicate condition:

   &TABLE_ALIAS.PRIMARY_CONTACT_ID=hz_session_util.get_user_partyid

11. Click Save to close the Create Database Resource Condition dialog box.


13. Click Policy tab and click the Create icon to open the Create Policy dialog box.

14. Click General Information tab and enter the name of the policy in the Name field as Grant on Activities.

15. Select the current date using Select Date for the Start Date field.

16. Click the Role tab, click Add to open Select and Add: Roles dialog box.

17. For Choose a Role Type, choose the Application Role option.

18. Enter role name as OSC_CUSTOMER_CONTACT_JOB for the Role Name field. OSC indicates Sales Contact User. Select the option crm for the Application field. Click Search.

19. Select Sales Contact User in the search results. Click Apply. Click OK to close the Select and Add: Roles dialog box.

20. Click Rule tab and select Multiple Values option for the Row Set field.

21. For the Condition field, click the Search icon to open the Pick a Set of Database Row dialog box.

22. Select the Access activities related to Sales Contact User option and click OK.

23. Click the Action tab and from the set of Available Actions, select Read and move it to the Selected Actions box.

24. Click Save and Close to close the Create Policy dialog box.

25. Click Save and then click Submit on the Edit Data Security: ZMM_ACTY_ACTIVITIES page.


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ZMM_NOTES

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


3. In the Administration subtab, click Manage Database Resources.

4. In the Search section, enter ZMM_NOTES in the Object Name field and click Search.

5. Click Edit in Search Results to open Edit Data Security: ZMM_NOTES page.

6. Click Policy tab and click the Create icon to open the Create Policy dialog box.

7. Click General Information tab and enter the name of the policy in the Name field as Grant on Notes.

8. Select the current date using Select Date for the Start Date field.

9. Click the Role tab, click Add to open Select and Add: Roles dialog box.

10. For Choose a Role Type, choose the Application Role option.

11. Enter role name as OSC_CUSTOMER_CONTACT_JOB for the Role Name field. OSC indicates Sales Contact User. Select the option crm for the Application field. Click Search.

12. Select Sales Contact User in the search results. Click Apply. Click OK to close the Select and Add: Roles dialog box.

13. Click Rule tab and select All Values option for the Row Set field.

14. Click the Action tab and from the set of Available Actions, select Read and move it to the Selected Actions box.

15. Click the Action tab and from the set of Available Actions, select Update and move it to the Selected Actions box.

16. Click the Action tab and from the set of Available Actions, select Delete and move it to the Selected Actions box.

17. Click Save and Close to close the Create Policy dialog box.

18. Click Save and then click Submit on the Edit Data Security: ZMM_NOTES page.

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__ORAFS__CaseToContact_c

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

3. In the Administration subtab, click Manage Database Resources.
4. In the Search section, enter __ORAFS__CaseToContact in the Object Name field and click Search.
5. Click Edit in Search Results to open Edit Data Security: __ORAFS__CaseToContact_c page.
6. Click Condition tab and click the Create icon to open the Create Database Resource Condition dialog box.
7. Enter the name in the Name field for the resource condition as HZREFENTITIESXMMCASE1.
8. Enter the display name of the condition in the Display Name field as Access contact for case related to Sales Contact User.
9. For Condition Type, select the option SQL Predicate.
10. In the SQL Predicate field, enter the following predicate condition:

   \[
   \&\text{TABLE\_ALIAS}.\text{attribute\_category} = '__ORAFS__CaseToContact_c' \text{ and } \&\text{TABLE\_ALIAS}.\text{target\_id1} = \text{hz\_session\_util\_get\_user\_partyid}
   \]
11. Click Save to close the Create Database Resource Condition dialog box.
12. Click Save on the Edit Data Security: __ORAFS__CaseToContact_c page.
13. Click Policy tab and click the Create icon to open the Create Policy dialog box.
14. Click General Information tab and enter the name of the policy in the Name field as Grant on __ORAFS__CaseToContact_c.
15. Select the current date using Select Date for the Start Date field.
16. Click the Role tab, click Add to open Select and Add: Roles dialog box.
17. For Choose a Role Type, choose the Application Role option.
18. Enter role name as OSC_CUSTOMER_CONTACT_JOB for the Role Name field. OSC indicates Sales Contact User. Select the option crm for the Application field. Click Search.
19. Select Sales Contact User in the search results. Click Apply. Click OK to close the Select and Add: Roles dialog box.
20. Click Rule tab and select Multiple Values option for the Row Set field.
21. For the Condition field, click Search to open the Pick a Set of Database Row dialog box.
22. Select the Access contact for case related to Sales Contact User option and click OK.
23. Click the Action tab and from the set of Available Actions, select Read and move it to the Selected Actions box.
24. Click Save and Close to close the Create Policy dialog box.
25. Click Policy tab and click the Create icon to open the Create Policy dialog box.
26. Click General Information tab and enter the name of the policy in the Name field as Grant on __ORAFS__CaseToResource_c.
27. Select the current date using Select Date for the Start Date field.
28. Click the Role tab, click Add to open Select and Add: Roles dialog box.
29. For Choose a Role Type, choose the Application Role option.
30. Enter role name as OSC_CUSTOMER_CONTACT_JOB for the Role Name field. OSC indicates Sales Contact User. Select the option crm for the Application field. Click Search.
31. Select Sales Contact User in the search results. Click Apply. Click OK to close the Select and Add: Roles dialog box.
32. Click the Rule tab and select Functional Grant option for the Row Set field.
33. Click the Action tab and from the set of Available Actions, select Read and move it to the Selected Actions box.
34. Click Save and Close to close the Create Policy dialog box.
35. Click Save and then click Submit on the Edit Data Security: __ORAFS__CaseToContact_c page.

__ORAFS__CaseToResource_c

1. Sign in to Oracle Sales Cloud using Administrator role.
3. In the Administration subtab, click Manage Database Resources.
4. In the Search section, enter __ORAFS__CaseToResource for the Object Name field and click Search.
5. Click **Edit** in **Search Results** to open **Edit Data Security: __ORAFS__CaseToResource_c** page.
6. Click **Condition** tab and click the **Create** icon to open the Create Database Resource Condition dialog box.
7. Enter the name in the **Name** field for the resource condition as **HZREFENTITIESXMMCASE2**.
8. Enter the display name of the condition in the **Display Name** field as **Access resource for case related to Sales Contact User**.
9. For **Condition Type**, select the option **SQL Predicate**.
10. In the **SQL Predicate** field, enter the following predicate condition:

```
&TABLE_ALIAS.attribute_category='__ORAFS__CaseToResource_c' and &TABLE_ALIAS.source_id1 in (select source_id1 from hz_ref_entities_xmm where target_id1 = hz_session_util.get_user_partyid)
```

11. Click **Save** to close the Create Database Resource Condition dialog box.
12. Click **Save** on the **Edit Data Security: __ORAFS__CaseToResource_c** page.
13. Click **Policy** tab and click the **Create** icon to open the Create Policy dialog box.
14. Click **General Information** tab and enter the name of the policy in the **Name** field as **Grant on __ORAFS__CaseToResource_c**.
15. Select the current date using **Select Date** for the **Start Date** field.
16. Click the **Role** tab, click **Add** to open Select and Add: Roles dialog box.
17. For **Choose a Role Type**, choose the **Application Role** option.
18. Enter role name as **OSC_CUSTOMER_CONTACT_JOB** for the **Role Name** field. **OSC** indicates Sales Contact User. Select the option **crm** for the **Application** field. Click **Search**.
19. Select **Sales Contact User** in the search results. Click **Apply**. Click **OK** to close the Select and Add: Roles dialog box.
20. Click **Rule** tab and select **Multiple Values** option for the **Row Set** field.
21. For the **Condition** field, click the **Search** icon to open the Pick a Set of Database Row dialog box.
22. Select the **Access resource for case related to Sales Contact User** option and click **OK**.
23. Click the Action tab and from the set of **Available Actions**, select **Read** and move it to the **Selected Actions** box.
24. Click **Save and Close** to close the Create Policy dialog box.
25. Click Policy tab and click the **Create** icon to open the Create Policy dialog box.
26. Click **General Information** tab and enter the name of the policy in the **Name** field as **Grant on __ORAFS__CaseToResource_c**.
27. Select the current date using **Select Date** for the **Start Date** field.
28. Click the **Role** tab, click **Add** to open Select and Add: Roles dialog box.
29. For **Choose a Role Type**, choose the **Application Role** option.
30. Enter role name as **OSC_CUSTOMER_CONTACT_JOB** for the **Role Name** field. **OSC** indicates Sales Contact User. Select the option **crm** for the **Application** field. Click **Search**.
31. Select **Sales Contact User** in the search results. Click **Apply**. Click **OK** to close the Select and Add: Roles dialog box.
32. Click Rule tab and select **Functional Grant** option for the **Row Set** field.
33. Click the Action tab and from the set of **Available Actions**, select **Read** and move it to the **Selected Actions** box.
34. Click **Save and Close** to close the Create Policy dialog box.
35. Click **Save** and then click **Submit** on the **Edit Data Security: __ORAFS__CaseToResource_c** page.

**FND_LOOKUP_TYPES**

1. Sign in to Oracle Sales Cloud using Administrator role.
2. On the Navigator, in Tools, click **Security Console**.
3. In the Administration subtab, click **Manage Database Resources**.
4. In the Search section, enter **FND_LOOKUP_TYPES** in the **Object Name** field and click **Search**.
5. Click **Edit** in **Search Results** to open **Edit Data Security: FND_LOOKUP_TYPES** page.
6. Click Policy tab and click the **Create** icon to open the Create Policy dialog box.
7. Click General Information tab and enter the name of the policy in the Name field as Grant on Application Lookup Type.
8. Select the current date using Select Date for the Start Date field.
9. Click the Role tab, click Add to open Select and Add: Roles dialog box.
10. For Choose a Role Type, choose the Application Role option.
11. Enter role name as OSC_CUSTOMER_CONTACT_JOB for the Role Name field. OSC indicates Sales Contact User. Select the option crm for the Application field. Click Search.
12. Select Sales Contact User in the search results. Click Apply. Click OK to close the Select and Add: Roles dialog box.
13. Click the Rule tab and select All Values option for the Row Set field.
14. Click the Action tab and from the set of Available Actions, select Read and move it to the Selected Actions box.
15. Click Save and Close to close the Create Policy dialog box.
16. Click Save and then click Submit on the Edit Data Security: FND_LOOKUP_TYPES page.

Creating a Job Role for Adding Permission to Access User Provisioning Functionality

For accessing user provisioning functionality, you must create a job role. You must create a Provision Manager role with access to perform user provisioning of contacts from the Case Details page.

To create a job role for adding permission to access user provisioning functionality:

1. Sign in to Oracle Sales Cloud using Administrator role.
3. In the Roles subtab, click Create Role button.
4. Enter the Basic Information as defined in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Name</td>
<td>Provision Manager</td>
</tr>
<tr>
<td>Role Code</td>
<td>OSC_PROVISION_MANAGER_JOB</td>
</tr>
<tr>
<td>Role Category Name</td>
<td>CRM - Job Roles</td>
</tr>
</tbody>
</table>

6. Click Add Function Security Policy.

Add Function Security Policy dialog box opens.
7. In the Search drop-down list, select Privileges and search for Provision Contact Access to Inheritance Management.

The search displays the privilege.
8. Click Add Privilege to Role.

Confirmation dialog box is displayed.
9. Click OK.
11. Click **Summary and Impact Report** train stop.

Create Role Provision Manager: Summary and Impact Report is displayed.

12. Click **Save and Close**.

---

**Adding External Users to Oracle Social Network**

You must add external users to Oracle Social Network for automatically creating a corresponding account for these external users in an external database such as LDAP directory service.

To add external users to Oracle Social Network:

1. Sign in to Oracle Social Network.
2. From the user name (for example, FAAdmin) drop-down list on the Oracle Social Network page, click **Administration**.
3. In the pane, click **Extended Collaboration**. Extended Collaboration page opens.
4. Select **Enabled** radio button option corresponding to **Invitations** field.
5. In the Employees section, for **Employee Whitelist** field, enter comma-separated list of domain names of the organizations of employees.

> **Note:** Enter at least one domain name. Only those employees whose email addresses comprise of the domain name entered for the **Employee Whitelist** field can receive invitations to join Oracle Social Network.

6. In the Outside Users section, for **Outside Users Whitelist** field, enter comma-separated list of domain names of the organizations of external users.

> **Note:** Enter at least one domain name. Only those external users whose email addresses comprise of the domain name entered for the **Outside Users** field can receive invitations to join Oracle Social Network as external users. When you create a new external user account in Oracle Social Network, automatically a corresponding account is created in an external database such as LDAP directory service.

7. Click **Save**.

---

**Creating Defaulted Tasks for Case**

You must create defaulted tasks for a case and then assign contacts to the case in Oracle Sales Cloud for Financial Services.

> **Note:** Ignore this information if you have already configured tasks.

To create default tasks for a case:

1. In the Setup and Maintenance work area, go to the following:
   - Functional Area: Application Extensions
2. Create a new lookup with the following values:
   - Lookup Type: CASE_DEFAULT_TASKS
   - Meaning and description: Case default tasks
   - Module: Select CRM Application Composer

3. Click **Save**.

4. Create new lookup codes with the values provided in the following table in CASE_DEFAULT_TASKS.

<table>
<thead>
<tr>
<th>Lookup Code</th>
<th>Display Sequence</th>
<th>Meaning</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>10</td>
<td>1</td>
<td>ORA_AFS_DECLARATION:Submit</td>
<td>or AFS_DECLARATION:Submit</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Death Certificate</td>
<td>Death Certificate</td>
</tr>
<tr>
<td>20</td>
<td>2</td>
<td>ORA_AFS_MONTH:Notify Employer</td>
<td>or AFS_MONTH:Notify Employer</td>
</tr>
<tr>
<td>30</td>
<td>3</td>
<td>ORA_AFS_WEEK:Notify Insurance Adviser</td>
<td>or AFS_WEEK:Notify Insurance Adviser</td>
</tr>
</tbody>
</table>

5. Click **Save and Close**.

The following table lists the ready-to-use lookup codes for Succession Task Categories.

<table>
<thead>
<tr>
<th>Category</th>
<th>Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Declaration of Demise</td>
<td>ORA_AFS_DECLARATION</td>
</tr>
<tr>
<td>Procedures to perform within a month</td>
<td>ORA_AFS_MONTH</td>
</tr>
<tr>
<td>Procedures to perform within a week</td>
<td>ORA_AFS_WEEK</td>
</tr>
</tbody>
</table>

Creating New Default Tasks
Customers can create or modify their own user-defined default tasks. Following are the instructions:

Creating or Editing Tasks Using Existing Lookup Values of Succession Task Category
Perform the following steps to modify or create new tasks using the existing Succession Task Category lookup values as described in the preceding table.

1. Sign in to Oracle Sales Cloud using Sales Administrator role.
2. In the Setup and Maintenance work area, go to the following:
   - Functional Area: Application Extensions
   - Task: Manage Standard Lookups
3. Search for the lookup code **Case_DEFAULT_TASKS**.
4. Add a new lookup according to the format specified in the preceding step. Lookup meaning must be of the format Lookup code of Succession Task category: Task Subject. For example, ORA_AFS_MONTH: Submit identity proof.

Creating or Editing Tasks with New Lookup Values of Succession Task Category

Perform the following steps to modify or create new tasks using the existing Succession Task Category lookup values as described in the preceding table.

1. Sign in to Oracle Sales Cloud using Sales Administrator role.
2. In the Setup and Maintenance work area, go to the following:
   - Functional Area: Application Extensions
   - Task: Manage Standard Lookups
3. Search for the lookup code ORA_AFS_TASK_CATEGORY.
4. Add the new task category that you want to add.
   - Note the list of values code of the newly added value.
5. Repeat steps in the preceding subsection to add new task to the CASE_DEFAULT_TASKS lookup using the newly added task category.

Adding Account Provisioning Lookup to Contact

For provisioning account for contacts, add account provisioning lookup to contact in Oracle Sales Cloud for Financial Services.

To add account provisioning lookup to contact:

1. Sign in to Oracle Sales Cloud as an administrator.
2. Navigate to Application Composer.
3. Expand Contact in Standard Objects.
4. Click Fields in Contact. Fields page opens.
5. Click the Create a custom field icon.
6. Select Field Type window opens.
7. Select Choice List (Fixed) option.
8. Click OK.
10. In the Appearance section, enter Display Label value as Account Provisioning Status.
11. In the Name section, enter Name as AccProvStatus. Note that the Name must be entered as AccProvStatus only without any changes since this name is used for query.
12. In the List of Values section, click the Create a New Lookup Type icon.
13. Create Lookup Type dialog box opens.
14. For the Meaning field, enter the value as Account Provision Status.
15. For the Lookup Type field, enter the value as ACC_PROV_STATUS.
16. In the Lookup Codes section, click the Create Lookup Code icon.
17. For the Meaning field, enter the value as New.
18. For the Lookup Code field, enter the value as NEW.
19. Click the Create Lookup Code icon.
20. For the Meaning field, enter the value as Completed.
21. For the Lookup Code field, enter the value as COMPLETED.
22. Click Save.
23. In the Default Value section, select New from the Fixed Value drop-down list.
24. Click Save and Close.

Creating Object Workflow to Send Email Notification

For sending email notifications to contacts using Oracle Sales Cloud for Financial Services, you must create an email template and an object workflow.

To create an email template:

1. Sign in to Oracle Sales Cloud as an administrator.

   ▶ Note: Ensure that you are not in a Sandbox environment.

2. Navigate to Application Composer.
3. Click Email Templates in Common Setup.
4. Click the Add icon to create new email template.

   Create Email Template window opens.

5. Select the object as Contact and enter Name for the email template that you must build.
6. To add any further details to the subject, optionally, in the Email Subject section, you can select any option from the drop-down list and click Insert.

   ▶ Note: The email subject changes automatically based on the subject selected.

7. To add any further details to the description, in the Email Body section, you can select any option from the drop-down list and click Insert.

   Note that the email body changes automatically based on the subject selected.

8. Following content is recommended for Email body:
   - Link to download the application.
   - Mobile application configuration link that includes host, port, and secure socket layer (SSL) details.
   - The configuration must be of the following format: <domain name>-ext.us.oracle.com
     443 is the default https port.
   - The password reset link to reset password. For example: https://<domain name>-ext.us.oracle.com/admin/faces/pages/pwdmgmt.jspx.
     Domain name is the same as in the sales cloud url.
   - A note to mention that user credentials will be mailed to the user in a separate mail.
   - Click Save and Close.

9. In the Email Details section, in Recipient Type, in Email fields on record field, click the Add Recipients icon.
   Add More Recipients dialog box opens.
10. Select **Primary Email** in **Available Recipients** and move it into **Selected Recipients**.
11. Click **OK**.
12. Click **Save** to close the Create Email Template window.

To create object workflow to send email notification:

1. Sign in to Oracle Sales Cloud as an administrator.
2. Navigate to Application Composer.
3. Click **Object Workflows** in **Common Setup**.
4. Object Workflows page opens.
5. Click the **Create** icon.
7. Specify **Object** as **Contact**.
8. Enter **Name** as **Inheritance Management Notification**.
9. Enter **Description** as **Send email notification for downloading inheritance management Application**.
10. In the Event Point and Condition section, specify **Event Point** as **When a record is updated**.
11. Click the **Groovy Builder** icon.
12. Expression Builder dialog box opens.
13. Enter the following condition:
   ```groovy
   if(isAttributeChanged('AccProvStatus_c') & AccProvStatus_c=='COMPLETED')
   return true;
   ```
14. In the Actions section, click the **Create** icon corresponding to **Email Notification**.
15. Create Action: Email Notification page opens.
16. For **Name** field, enter **Account Provisioning Status**.
17. In the Email Details section, click the drop-down list and select the Email template created earlier.
18. Click **To Address** section.
   Create Action: Email Notification: To Address page opens.
19. Click **Fields on Record**.
20. Select **Primary Email** in **Available Fields on Record** and move it into **Selected Fields on Record**.
21. Click **Save** to save and close all the open pages.

### Enabling Conversations Subtab in Case

You can enable Conversations subtab in Case object.

Following are the steps to enable Conversations subtab in Case object:

1. Sign in to Oracle Sales Cloud using Application Implementation Consultant role.
2. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Oracle Social Network Objects
3. Search for and select the **Manage Oracle Social Network Objects** task.
4. In the Business Objects section, expand the **Trading Community Model** object.
5. In the Trading Community Model, select **Case** object.
6. Add the required Case attributes in the Case: Attributes section.
7. With Case object selected in Business Objects section, click Enable Object button.
8. Select Automatic option in the Case: Enable Object dialog box and click OK.
9. Click Save.
10. Click Synchronize button next to Save.

Wait for the process to complete.
11. Click OK on the Confirmation dialog box.
12. Click Update Translations next to Save.
13. Click Cancel.
14. Click Done.
18 Updating Needs Analysis Interview from Release 12 to Release 13

Updating Needs Analysis Interviews from Release 12 to Release 13

If you are upgrading Oracle Sales Cloud for Financial Services from release 12 to release 13, you must update the release 12 needs analysis interviews for opportunity and lead.

Update mapping for child revenue for opportunity and lead to update the release 12 needs analysis interviews for opportunity and lead.

Mapping 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 Oracle Policy Automation hub.
2. Click Deployment.
3. From the list of deployments, select the R12 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:

<table>
<thead>
<tr>
<th>Attribute Text</th>
<th>Type (Attribute)</th>
<th>MappedIn</th>
<th>MappedOut</th>
</tr>
</thead>
<tbody>
<tr>
<td>OptyChildRevenue Prodname</td>
<td>Text</td>
<td>Name</td>
<td>Name</td>
</tr>
<tr>
<td>OptyChildRevenue InvItemid</td>
<td>Number</td>
<td>InventoryItemId</td>
<td>InventoryItemId</td>
</tr>
<tr>
<td>OptyChildRevenue Revn Id</td>
<td>Number</td>
<td>RevnId</td>
<td>RevnId</td>
</tr>
<tr>
<td>OptyChildRevenue Opty Id</td>
<td>Number</td>
<td>OptyId</td>
<td>OptyId</td>
</tr>
<tr>
<td>OptyChildRevenue org id</td>
<td>Number</td>
<td>OrganizationId</td>
<td>OrganizationId</td>
</tr>
</tbody>
</table>

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Chapter 18
Updating Needs Analysis Interview from Release 12 to Release 13

13
Updating Needs Analysis Interview from Release 12 to Release 13

<table>
<thead>
<tr>
<th>Attribute Text</th>
<th>Type (Attribute)</th>
<th>MappedIn</th>
<th>MappedOut</th>
</tr>
</thead>
<tbody>
<tr>
<td>OptyChildRevenue Amount</td>
<td>Number</td>
<td>RevnAmount</td>
<td>RevnAmount</td>
</tr>
</tbody>
</table>

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.

**Mapping 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 Oracle Policy Automation hub.
2. Click **Deployments**.
3. From the list of deployments, select the `R12` 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/MklProdAssoc1` for the **Mapped to** field.
    b. Click **OK**.
11. For the `ChildRevenue` entity, create attributes specified in the following table:

<table>
<thead>
<tr>
<th>Attribute Text</th>
<th>Type (Attribute)</th>
<th>MappedIn</th>
<th>MappedOut</th>
</tr>
</thead>
<tbody>
<tr>
<td>ChildRevenue InvItemId</td>
<td>Number</td>
<td>InventoryItemId</td>
<td>InventoryItemId</td>
</tr>
<tr>
<td>ChildRevenue Id</td>
<td>Number</td>
<td>LeadProductld</td>
<td>LeadProductld</td>
</tr>
<tr>
<td>ChildRevenue Lead Id</td>
<td>Number</td>
<td>Leadld</td>
<td>Leadld</td>
</tr>
<tr>
<td>ChildRevenue orgId</td>
<td>Number</td>
<td>OrganizationId</td>
<td>OrganizationId</td>
</tr>
<tr>
<td>ChildRevenue Amount</td>
<td>Number</td>
<td>Amount</td>
<td>Amount</td>
</tr>
</tbody>
</table>

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.