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   Configuring Siebel Web Services
   Enabling Pricing for Quotes
   Configuring Siebel CRM for Contract Renewal Opportunity

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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 Communications 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>Guide</th>
<th>Description</th>
</tr>
</thead>
<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 Implementing Sales</td>
<td>Describes tasks to configure and set up Sales.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Extending Sales</td>
<td>Describes how to use tools to configure and extend Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Groovy Scripting Reference for Application Composer</td>
<td>Describes the basics of using the Groovy scripting language to enhance your Oracle Sales Cloud offerings.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Understanding File-Based Data Import and Export</td>
<td>Describes how to import legacy and other data into Oracle Sales Cloud using File-Based Data Import.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Securing Sales Cloud</td>
<td>Describes how to enable user access to Oracle Sales Cloud functions and data.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Security Reference</td>
<td>Provides a reference of roles, role hierarchies, privileges, and policies as delivered for the Sales offering.</td>
</tr>
</tbody>
</table>

You must also refer to the documents listed in the following table, to perform tasks to set up Communications.

<table>
<thead>
<tr>
<th>Documents</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Collateral for Oracle Sales Cloud for Communications (2099189.1)</td>
<td>Contains files that you must download and save to implement Oracle Sales Cloud for Communications.</td>
</tr>
</tbody>
</table>
**Related Topics**

- Oracle Help Center
Chapter 2
Implementation Overview

Setup Tasks List

This topic provides a list of tasks that you must perform to set up Oracle Sales Cloud for Communications. These tasks are categorized on the basis of the tools that you use to perform the tasks.

Tasks Checklist

Sign in to Oracle Sales Cloud for Communications and complete the following tasks.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Download and unpack setup files</td>
<td>Contains files to set up Oracle Sales Cloud for Communications.</td>
</tr>
<tr>
<td>Configure Siebel CRM</td>
<td>Integrate Siebel CRM with Oracle Sales Cloud.</td>
</tr>
<tr>
<td>Configure Oracle Sales Cloud</td>
<td>Configure Oracle Sales Cloud for integration with Siebel CRM.</td>
</tr>
<tr>
<td>Configure Sales Configurable Home Page</td>
<td>Configure the page to view key performance reports.</td>
</tr>
</tbody>
</table>

Note: The Account sub tab view displaying the billing usage data from the Oracle Billing Insight and the Oracle Self Service E-Billing Account Identification field in the Account object are now hidden by default. If you use Oracle Billing Insight, you must enable the display of the View and Account Identification field in Oracle Sales Cloud.

For information about how to set up the integration, see Integrating Oracle Sales Cloud with Siebel CRM (1670543.1) on My Oracle Support.

Related Topics
- Integrating Oracle Sales Cloud with Siebel CRM

Prerequisites

You must perform the implementation steps covered in this guide in conjunction with Oracle Sales Cloud implementation steps to set up the Communications industry solution.
Software Requirements for Siebel CRM

Ensure that the Siebel CRM tools are running and the following Siebel CRM modules are enabled:

- Accounts
- Opportunities
- Quotes
- Contacts
- Agreements
- Administration - Product
- Administration - Pricing
- Siebel Tools

For more information, see Integrating Oracle Sales Cloud with Siebel CRM (1670543.1) on My Oracle Support.

⚠️ **Caution:** To configure Siebel CRM Web Service (WSDL) in Oracle Sales Cloud Application Composer, you must upgrade security settings of Siebel CRM server by enabling **TLS 1.2**. Check the **TLS** version by performing following steps:

- Open WSDL on your browser.
- View the certificate in your browser. Refer to your browser’s documentation for the procedure to view certificates.
- Verify **TLS** version in the certificate details. The **TLS** version should 1.2 or higher.

**Related Topics**

- Collateral for Oracle Sales Cloud for Communications
- Integrating Oracle Sales Cloud with Siebel CRM

Unpacking the Collateral

The collateral contains files that you require for setting up the Communications solution. You must first download and save the collateral on your desktop, and then extract the files.

To download the collateral:

1. Open Collateral for Oracle Sales Cloud for Communications (2099189.1), from My Oracle Support.
2. Right-click and save the SALES_FOR_COMMUNICATIONS compressed file.
3. Extract the contents to a folder.

The following table lists the subfolders in the SALES_FOR_COMMUNICATIONS compressed file.

<table>
<thead>
<tr>
<th>Application</th>
<th>Subfolder</th>
<th>Second Subfolder</th>
<th>File Name</th>
</tr>
</thead>
</table>
### Chapter 2
Getting Started with Communications Implementation

#### Implementation Overview

<table>
<thead>
<tr>
<th>Application</th>
<th>Subfolder</th>
<th>Second Subfolder</th>
<th>File Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud</td>
<td>SQL</td>
<td>NA</td>
<td>DVMs-Rei8.xlsx</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>ItemsImportSQL.txt</td>
</tr>
<tr>
<td>Oracle Sales Cloud</td>
<td>TRANSLATION</td>
<td>NA</td>
<td>Translations of Custom Fields for Resource Object.pdf</td>
</tr>
<tr>
<td>SIEBEL</td>
<td>CSV</td>
<td>NA</td>
<td>organizationImport_SystemPreferenceParams.CSV</td>
</tr>
<tr>
<td>SIEBEL</td>
<td>OPENUI</td>
<td>HTML</td>
<td>O_INT_SBL_ErrorPage.html</td>
</tr>
<tr>
<td>SIEBEL</td>
<td>SIF</td>
<td>NA</td>
<td>BC_Revenue.sif</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>CRTrigger_BC_FSAgreementItem.sif</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>CRTrigger_BC_ServiceAgreement.sif</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>CRTrigger_IO_CZServiceAgreementIntegObj.sif</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>IO_AccountInterface.sif</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>IO_SWIOpportunityIO.sif</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Organization_Mapping_IP2015_Deliverable.sif</td>
</tr>
<tr>
<td>SIEBEL</td>
<td>WORKFLOW</td>
<td>SIF</td>
<td>CRTrigger_WF_CreateOSCContractRenewalOpportunity.sif</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>WF - SIS OM Update Revenue.sif</td>
</tr>
<tr>
<td>SIEBEL</td>
<td>WORKFLOW</td>
<td>XML</td>
<td>CRTrigger_Datamap_ContractRenewalOutboundMap.XML</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>O_INT_OSC_DeleteRevn_DataMap.XML</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>O_INT_OSC_UpdateOpty_DataMap.XML</td>
</tr>
</tbody>
</table>

**Related Topics**
- Collateral for Oracle Sales Cloud for Communications
3 Configuring Siebel CRM for Integration with Oracle Sales Cloud

Setting Up Tasks to Integrate Siebel CRM

You must set up the integration of Siebel CRM with Communications solution. Refer to Integrating Oracle Sales Cloud with Siebel CRM (1670543.1) on My Oracle Support, and perform the setup tasks. The following table lists the relevant topics to complete the tasks.

<table>
<thead>
<tr>
<th>Setup Task</th>
<th>Topics</th>
</tr>
</thead>
</table>
| Configure Web Services                         | • Exposing Web Services.  
• Deploying Web Services.  
• Hosting the Siebel CRM WSDL Files. |
| View Siebel CRM in a new window                | Hosting the Error File for Siebel CRM window launch with the O_INT_SBL_ErrorPage.html file. |
| Add Configurations to Synchronize Opportunity  | • Creating Oracle Sales Cloud Sales Methods in Siebel CRM.  
• Required Setup for Sales Methods and Sales Stages.  
• Verifying Currency Mapping for Opportunity Synchronization. |
| Price lists in Siebel CRM                     | Creating Price lists in Siebel CRM.                                    |
| Configure Siebel CRM for Contract Renewal Opportunity | Perform this task in Oracle Sales Cloud.                              |
| Add configurations for Organization Mapping    | Performing Required Setup for Organization Mapping.                   |

\[Note\]: Use the following files: Organization_Mapping_IP2015_Deliverable.sif and OrganizationImport_SystemPreferenceParams.CSV after updating the values in the CSV file.

Related Topics

• Integrate Oracle Sales Cloud with Siebel CRM

Configuring Siebel Web Services

Synchronize accounts, contacts, and opportunities from Oracle Sales Cloud to Siebel CRM using Siebel Web Services.

\[Note\]: Before exposing Siebel Web Services, ensure that you configure the quote and opportunity services in Siebel Tools.
The following Siebel Web Services are used in the integration:

- Siebel Account
- Siebel Contact
- SWIOpportunityServices
- WC_Opportunity_BS
- WC_Account_BS
- WC_Contacts_BS
- SWIAddressServices
- SelfServiceAddress

To configure the SWI opportunity services, import the following SIF files from IO_SWIOpportunityIO.sif:

- Compile the integration objects for Web Service
- Restart the Siebel CRM Servers

To configure the Siebel Account services:

1. Import the SIF file IO_AccountInterface.sif.
2. Compile the integration objects Account Interface and Internal Account Interface.
3. Restart the Siebel CRM Servers.

**Caution:** To configure Siebel CRM Web Service (WSDL) in Oracle Sales Cloud Application Composer, you must upgrade security settings of Siebel CRM server by enabling **TLS 1.2**. Check the **TLS** version by performing following steps:

- Open WSDL on your browser.
- View the certificate in your browser. Refer to your browser’s documentation for the procedure to view certificates.
- Verify **TLS** version in the certificate details. The **TLS** version should 1.2 or higher.

### Enabling Pricing for Quotes

You must have a configured price list to create quotes from an opportunity. Price lists contain the price for all the products in Oracle Sales Cloud that are mapped to Siebel CRM. You must set up a price list in Siebel CRM and then associate it to the corresponding Oracle Sales Cloud account as required.

### Configuring Siebel CRM for Contract Renewal Opportunity

An outbound Oracle Sales Cloud Web Service for opportunity is called to create opportunities in Oracle Sales Cloud. Siebel CRM workflow checks expiring agreements, and opportunity service. For more information on how to set up the configurations, see Integrating Oracle Sales Cloud with Siebel CRM (1670543.1) on My Oracle Support.

To configure Siebel CRM for contract renewal opportunity in Oracle Sales Cloud, you must do the following:

2. Extend objects.
3. Configure the workflow.
4. Create a data map.

Configure Siebel Outbound Web Service

The following table lists the tasks required to configure Siebel Outbound Web Services. The table also shows you where you can find the topics.

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Integrating Oracle Sales Cloud with Siebel CRM (1670543.1)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create an outbound Web Service based on a WSDL file.</td>
<td>• Setting Up the Outbound Web Service in Siebel Tools.</td>
</tr>
<tr>
<td></td>
<td>• Restarting the Siebel Server and Verifying that the New Outbound Web Service was Created.</td>
</tr>
<tr>
<td></td>
<td>• Verifying the Outbound Web Service.</td>
</tr>
<tr>
<td>Add name spaces to the integration configurations created during the WSDL import.</td>
<td>Modifying the Outbound Web Service</td>
</tr>
<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

Note: Add __ORATC__ prefix for all field names with _c suffix, in the table Integration Component Map.

Extend Objects

To extend objects:

1. Download and save the SIF or XML files, as listed in the following table.

<table>
<thead>
<tr>
<th>Object</th>
<th>Object Name</th>
<th>Location</th>
<th>SIF or XML</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Component BC</td>
<td>Service Agreement</td>
<td>CRTrigger_BC_ServiceAgreement.sif</td>
<td>SIF</td>
</tr>
<tr>
<td>Business Component BC</td>
<td>FS Agreement Item</td>
<td>CRTrigger_BC_FSAgreementItem.sif</td>
<td>SIF</td>
</tr>
<tr>
<td>Integration Object IO</td>
<td>CZService Agreement Integ Obj</td>
<td>CRTrigger_IO_CZServiceAgreementIntegObj.sif</td>
<td>SIF</td>
</tr>
</tbody>
</table>

2. Extend BC Service Agreement:
   - Import the SIF file CRTrigger_BC_ServiceAgreement.sif
   - Compile BC Service Agreement.

3. Extend BC FS Agreement Item:
   - Import the SIF file CRTrigger_BC_FSAgreementItem.sif
   - Compile BC FS Agreement Item.
4. Extend IO CZService Agreement Integ Obj:
   - Import the SIF file CRTrigger_IO_CZServiceAgreementIntegObj.sif
   - Compile IO CZService Agreement Integ Obj.

Configure the Workflow

To configure the workflow:


2. Change the authentication value:
   - Navigate to Workflow Process in Object Explorer.
   - Search for Create OSC Contract Renewal Opportunity.
   - Select the record, and click Revise
     A new record is created for the workflow, with the next version number.
   - Right-click and select Edit Workflow Process.
   - Change the authentication.

   ✓ Note: Make sure that the user has custom roles and privileges to create opportunities in Oracle Sales Cloud. The user can then access custom objects Integration Configuration and Integration Map Lookup.

   i. Generate the base64 "Encoded" value by specifying the Oracle Sales Cloud (user):(password). You may use the link https://www.base64encode.org/ to generate such string as one of the options.
   ii. Go to step Outbound-Create Opportunity in Oracle Sales Cloud in workflow.
   iv. Change the input argument and replace it with Basic <encodedvalue> and specify the (user): (password).

3. Modify the contract expiry period. The default contract expiry period is 30 days after the system date in the workflow.
   The search criteria includes [Agreement end date >= (today + 30) and < (today + 31)]. The values of the following parameters in output arguments in Step 2 (Get Arguments) of the workflow can be modified to change the expiry period:
   - Agreement Expiry Period Start (Default value is Today + 30).
   - Agreement Expiry Period End (Default value is Today + 31).

4. Publish the workflow:
   - Right-click the workflow and select Validate.
   - Go to Object Explorer, Workflow Process, and search for Create OSC Contract Renewal Opportunity with the status as Progress.
   - Click the Publish/Activate icon from View, Toolbars, Workflow/Task Editor Toolbar.

5. Remove the outdated workflow process:
Create a Data Map

To create a data map:


   For more information, see the topic, Setting Up the System Preference for Currency Exchange Rate Implementation.

2. Import the data map.

   a. Go to Administration-Integration, Data Map Editor.
   b. Import the Data Map xml using CRTrigger_Datamap_ContractRenewalOutboundMap.xml

3. After creating the data map through XML import, perform the SalesMethodID and ProdGroupName tasks in Siebel CRM.

   **Note:** Make sure that you first import the products and create a new sales method in Oracle Sales Cloud.

   a. Replace the SalesMethodID:
      i. Obtain an identifier from the Oracle Sales Cloud database, using the following query:

         ```sql
         SELECT SALES_METHOD_ID FROM MOO_SALES_METHOD_VL WHERE NAME LIKE 'Renewal Sales Process%';
         ```
      ii. Replace the value of sales method identifier in ContractRenewal of type Integration Component Map with the value obtained from the database.

   b. Replace the ProdGroupName
      i. In the Setup and Maintenance work area, go to the following:
         o Offering: Sales
         o Functional Area: Sales Catalog and Products
         o Task: Manage Product Groups
      ii. Save the display name of the root product group. For example: Electronics.
      iii. Replace the value of ProdGroupName in ContractLineItems, of type Integration Component Map with the value obtained from Oracle Sales Cloud.

   c. Click **Validate**.

      The implementation is complete.

After you create a data map, schedule the workflow.

For more information, see Schedule the Workflow in Integrating Oracle Sales Cloud with Siebel CRM (1670543.1), on My Oracle Support.

**Related Topics**

- Integrating Oracle Sales Cloud with Siebel CRM
4 Configuring Oracle Sales Cloud for Integration with Siebel CRM

Configuring and Enabling Oracle Sales Cloud with Siebel CRM

This topic describes the tasks required to configure and enable the integration of Oracle Sales Cloud with Siebel CRM. The following table shows you where you can find the topics for these tasks. Perform the tasks in the sequence listed in the table.

<table>
<thead>
<tr>
<th>Tasks</th>
<th>Description</th>
<th>Integrating Oracle Sales Cloud with Siebel CRM (1670543.1)</th>
<th>Oracle Sales Cloud Getting Started with Communications Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Import Siebel CRM products to Oracle Sales Cloud</td>
<td>Synchronize products.</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Import sales methods and sales stage in Oracle Sales Cloud</td>
<td>The import helps to synchronize opportunities.</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Configure URLs for Siebel CRM</td>
<td>None</td>
<td>No</td>
<td>Yes</td>
</tr>
<tr>
<td>Create Web Service references in Oracle Sales Cloud</td>
<td>Create references to Siebel CRM Web Services and Oracle Sales Cloud Web References. See the topics:</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td></td>
<td>• Creating References to Siebel CRM Web Services</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Creating Oracle Sales Cloud Web Service References</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create Siebel CRM source system in Oracle Sales Cloud</td>
<td>See the topic, Adding Siebel CRM as a Source System in Oracle Sales Cloud</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>
## Tasks

<table>
<thead>
<tr>
<th>Description</th>
<th>Integrating Oracle Sales Cloud with Siebel CRM (1670543.1)</th>
<th>Oracle Sales Cloud Getting Started with Communications Implementation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configure Siebel CRM values in Oracle Sales Cloud</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Configure integration configuration and integration map lookup custom objects.</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>Define security policies for Custom Objects</td>
<td>None</td>
<td>No</td>
</tr>
<tr>
<td>Enable layouts to view object pages.</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Import employee resources</td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>Import the employee data using the File Import feature. See the topics:</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>• Generating Artifacts for Custom Fields</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Importing Employee Resources Using File Import</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

## Importing Siebel CRM Products to Oracle Sales Cloud

You must import items from Siebel CRM into Oracle Sales Cloud to generate opportunity revenue line items and quote line items. Oracle Sales Cloud for Communications supports product synchronization for the following product types:

- Simple
- Complex
- Bundled Promotion
- Compound

To export items from Siebel CRM use the following SQL: ItemsImportSQL.txt. The SQL files are available in the compressed file in Collateral for Oracle Sales Cloud for Communications (2099189.1), on My Oracle Support. After you import the items, add them to the catalog in Oracle Sales Cloud, for users to view the items in the UI.

## Creating Item Types in Oracle Sales Cloud

Oracle Sales Cloud for Communications supports only simple, compound, and bundled promotion Siebel CRM product types for synchronization. Item types are not available in Oracle Sales Cloud; therefore, you must create new item types to map products.

To create item types:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Sales Catalog and Products
Task: Manage Item Types

2. On the Manage Item Types page, add the following new records:

<table>
<thead>
<tr>
<th>Lookup Code</th>
<th>Enabled</th>
<th>Start Date</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>PR</td>
<td>Checked</td>
<td>1/1/59</td>
<td>Bundled Promotion</td>
</tr>
<tr>
<td>CP</td>
<td>Checked</td>
<td>1/1/59</td>
<td>Complex Product</td>
</tr>
<tr>
<td>CMPD</td>
<td>Checked</td>
<td>1/1/59</td>
<td>Compound Product</td>
</tr>
</tbody>
</table>

See Integrating Oracle Sales Cloud with Siebel CRM (1670543.1), on My Oracle Support, and do the following:

1. Map Siebel CRM UOM in Oracle Sales Cloud.
2. Create Items in Siebel CRM.
3. Import Items from Siebel CRM to Oracle Sales Cloud.

⚠️ Note: Use the template provided in the Item topic in the File-Based Data Import for Oracle Supply Chain Management Cloud guide at https://docs.oracle.com/en/cloud/saas/supply-chain-management/r13-update17d/oefsc/item-314033258-fbdi-8.html. While filling the template, ensure to delete values which are not required.

4. Add the Oracle Sales Cloud Item to the Sales Catalog.

Adding Privilege to View Item Details

You must add necessary privilege to view the item details.

1. Sign in to Oracle Sales Cloud as a user that has Product Information Management access.
2. In the Setup and Maintenance work area, go to the Manage Item Classes task.
3. On the Manage Item Classes page, click Root Item Class.
4. From the Security tab, in the Item Class People region, select for the user configured in the Contact Renewal workflow. You can click the Query By Example icon to search for the user.

⚠️ Note:
- If the user does not exist, click Add Row to add a new user.
- See Configuring Siebel CRM for Contract Renewal Opportunity, to configure the workflow.

5. On the Actions region, click Select and Add. Search for View Item Basic and click OK.
6. Click Save and Close.

Related Topics
- Integrating Oracle Sales Cloud with Siebel CRM
- Configuring Siebel CRM for Contract Renewal Opportunity in Oracle Sales Cloud for Communications
### Importing Sales Methods to Configure Sales Coach in Oracle Sales Cloud

All contract renewal opportunities are created with a default sales method: Renewal Sales Process. Import the new sales method and its sales stage into Oracle Sales Cloud, for synchronization.

To add sales coach to an existing sales method:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Opportunities
   - Task: Manage Sales Methods and Sales Stages
2. Search for the sales method named Renewal Sales Process, and edit it.
3. For each sales stage, click a record and add the process steps as listed in the following table.

<table>
<thead>
<tr>
<th>Sales Stage</th>
<th>Order</th>
<th>Process Steps</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>01 - Recommendation</td>
<td>1</td>
<td>Check Account Usage</td>
<td>Account service usage for billing periods, payment histories and analytics must be reviewed to understand in-depth account analysis.</td>
</tr>
<tr>
<td>01 - Recommendation</td>
<td>2</td>
<td>Check Contact's Digital Activity</td>
<td>Primary contact’s digital activity such as web access, e-mails and web searches must be reviewed.</td>
</tr>
<tr>
<td>02 - Presentation</td>
<td>1</td>
<td>Review Trouble Tickets</td>
<td>If there are any service requests or trouble tickets filed by the customer, they must be reviewed. Service request or trouble tickets must give true indications on problems with equipment, and general requests for service.</td>
</tr>
<tr>
<td>02 - Presentation</td>
<td>2</td>
<td>Schedule a meeting with the customer</td>
<td>A meeting with customer’s executives must be scheduled. During the meeting, service usage account summary, over usage, billing trend, service request or trouble tickets and recommendations must be presented.</td>
</tr>
<tr>
<td>03 - Quotation and Proposal</td>
<td>1</td>
<td>Check Existing Accounts Contracts</td>
<td>Master and subcontracts must be reviewed.</td>
</tr>
<tr>
<td>03 - Quotation and Proposal</td>
<td>2</td>
<td>Create a Quote</td>
<td>Based on the recommended bundled product options,</td>
</tr>
</tbody>
</table>
### Configuring Oracle Sales Cloud for Integration with Siebel CRM

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<table>
<thead>
<tr>
<th>Sales Stage</th>
<th>Order</th>
<th>Process Steps</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>04 - Negotiation</td>
<td>1</td>
<td>Schedule a meeting with customer</td>
<td>A final meeting is scheduled with the customer to review the latest quotes and understand if there any additional comments from the customer. The quote is summarized, margins distributions and deal quality are evaluated.</td>
</tr>
<tr>
<td>04 - Negotiation</td>
<td>2</td>
<td>Generate a Contract (Agreement)</td>
<td>A final meeting is scheduled with the customer to review the latest quotes and understand if there any additional comments from the customer. The quote is summarized, margins distributions and deal quality are evaluated.</td>
</tr>
<tr>
<td>05 - Closed</td>
<td>1</td>
<td>Sign a Contract</td>
<td>The contract proposal is sent to customer for signatures.</td>
</tr>
<tr>
<td>05 - Closed</td>
<td>2</td>
<td>Close the opportunity and indicate Won</td>
<td>Sales stage must be updated to indicate &quot;Won&quot; and probability is set to 100%.</td>
</tr>
</tbody>
</table>

If the sales method does not exist, import sales method and its sales stage to configure Sales Coach.

To import sales method:

1. In the Setup and Maintenance work area, go to the Manage Configuration Packages task.
2. In the Search Results region, click **Upload**.
3. Locate the configuration package to import ATC Renewal Sales Process Configuration compressed file, in the collateral.
4. Click **Get Details** and inspect the package metadata, to verify the package.
5. Click **Submit**, to upload the Sales Method configuration.
   - During the import, the sales method configurations in the environment are locked. The Status column indicates whether the import was successful.
6. After upload is successful, click **Import Setup Data**.
7. Retain the default values, and click **Next**, then on the page that appears click **Next**, and then click **Submit**.
8. Click **Refresh**, to verify that the import is successful.

### Configuring URLs for Siebel CRM

You can view the Siebel CRM windows after you configure the Siebel CRM URL in the topology object.

To configure the Siebel CRM URL:

1. Sign in to Oracle Sales Cloud as an administrator.
2. In the Setup and Maintenance work area, go to the Manage Setup Content task.

3. On the Manage Setup Content page, from the Topology Definition section, click Manage Third-Party Applications.

4. Create a new record for Siebel CRM with the following values.

<table>
<thead>
<tr>
<th>Siebel CRM Application</th>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>IP15</td>
<td>Application Name</td>
<td>SiebelBaseURL</td>
</tr>
<tr>
<td>IP15</td>
<td>Full URL</td>
<td>&lt;protocol&gt;: //&lt;host&gt;: &lt;port&gt;/ &gt;SiebelApplicationNameLanguage&gt;/ startswe</td>
</tr>
<tr>
<td>IP15</td>
<td>Partner Name</td>
<td>SiebelBaseURL</td>
</tr>
</tbody>
</table>

If the Siebel CRM window is not launched successfully, then an error page displays.

To configure error page URL for Siebel CRM:

1. Sign in to Oracle Sales Cloud as an administrator.
2. In the Setup and Maintenance work area, go to the Manage Setup Content task.
3. On the Manage Setup Content page, from the Topology Definition section, click Manage Third-Party Applications.
4. Create a new URL record with the following values.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Name</td>
<td>SiebelErrorPageURL</td>
</tr>
<tr>
<td>Full URL</td>
<td>&lt;protocol&gt;: //&lt;host&gt;: &lt;port&gt;/ &gt;SiebelApplicationNameLanguage&gt;</td>
</tr>
<tr>
<td>Partner Name</td>
<td>SiebelErrorPageURL</td>
</tr>
</tbody>
</table>

Configuring Siebel CRM Values in Oracle Sales Cloud

You must configure values in integration configuration to synchronize accounts, contacts, and opportunities to Siebel CRM. The configuration is required to launch Siebel CRM windows from an account or opportunity page. You must configure values in integration map lookup to synchronize opportunity. The configuration enables mapping sales method and sales stage between Oracle Sales Cloud and Siebel CRM.

Configuring Values in the Integration Configuration UI

Navigate to the Integration Configuration UI and enter values.

1. Click Navigator > Tools > Integration Configuration on the home page.
2. Configure key-value pairs listed in the following table using remote application value SIEBEL.
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Configuring Values in the Integration Map Lookup UI

Configure the remote values of sales methods, standard sales process, and renewal sales process and its sales stages in this custom object. Run the following query against the Siebel CRM database.

```sql
SELECT SM.NAME "Sales Method Name",
       SS.SALES_METHOD_ID "Sales Method Id",
       SS.NAME "Sales Stage Name",
       SS.ROW_ID "Sales Stage Id"
FROM S_STG SS, S_SALES_METHOD SM
WHERE SM.NAME in ('Standard Sales Process','Renewal Sales Process')
    AND SM.ROW_ID = SS.SALES_METHOD_ID;
```

If the user language is not English, then create the integration map lookup entries for standard sales process in the required language. To create entries in the sales stage records, translate the values in the Source Value and Source Parent Value fields. For sales method record, translate the values in the Source Value and retain Default as a value in the Source Parent Value field. The value for renewal sales process entries in the custom object must be in English, irrespective of the language used.

Enter the following records using the Oracle Sales Cloud UI:

1. Click **Navigator > Tools > Integration Map Lookup**.
2. Configure the value as listed in the following table, for the remote application value: SIEBEL.

<table>
<thead>
<tr>
<th>Key</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>LOVLanguageMode</td>
<td>LIC</td>
</tr>
<tr>
<td>ViewMode</td>
<td>All</td>
</tr>
<tr>
<td>SourceSystem</td>
<td>The source system defined as part of the setup. Example: SIEBEL</td>
</tr>
<tr>
<td>SYNC_TO_SBL_ACCOUNTS_CONTACTS</td>
<td>N</td>
</tr>
<tr>
<td>SYNC_TO_SBL_OPPTY_QUOTES</td>
<td>N</td>
</tr>
<tr>
<td>BIDI_SYNC_TO_SBL_ACCOUNTS_CONTACTS</td>
<td>N</td>
</tr>
</tbody>
</table>

**Note:** Configure the key-value pairs only if they do not exist.

Given the page is a continuation from the previous page, the values for SourceSystem are not included here. The values provided above are meant to illustrate the process for configuring values in the Integration Map Lookup UI.

Object Name: OPPORTUNITY
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---

<table>
<thead>
<tr>
<th>Key</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object Attribute</td>
<td>SALES METHOD or SALES METHOD - SALES STAGE</td>
</tr>
<tr>
<td>Source Value</td>
<td>Sales Method name SM.NAME or Sales stage name SS.NAME</td>
</tr>
<tr>
<td>Source Parent Value</td>
<td>DEFAULT for a sales method record. Or SM.NAME, the corresponding sales method name for a sales stage record.</td>
</tr>
<tr>
<td>Remote Value</td>
<td>SS.SALES_METHOD_ID a sales method ID for a Sales method record. Or SS.ROW_ID, a sales stage ID for a sales stages record.</td>
</tr>
</tbody>
</table>

---

### Prerequisites for Viewing Contract Renewal Opportunities

You can associate only synchronized accounts and contacts with a contract renewal opportunity. To view the contract renewal opportunities created from Siebel CRM for every expiring agreement, sign in to Oracle Sales Cloud and perform the following prerequisites:

1. Synchronize all accounts and contacts that are associated with agreements in Oracle Sales Cloud with Siebel CRM.
2. Import all line items that are associated with agreements in Oracle Sales Cloud from Siebel CRM.

**Note:** If you do not import the line item in Oracle Sales Cloud, the opportunity is not created in Oracle Sales Cloud.

---

### Mapping Field Values

The following table lists the contact title values that are supported for synchronization of Oracle Sales Cloud and Siebel CRM.

<table>
<thead>
<tr>
<th>Title in Oracle Sales Cloud</th>
<th>Title in Siebel CRM</th>
</tr>
</thead>
<tbody>
<tr>
<td>MR.</td>
<td>Mr.</td>
</tr>
<tr>
<td>MRS.</td>
<td>Mrs.</td>
</tr>
<tr>
<td>MS.</td>
<td>Ms.</td>
</tr>
<tr>
<td>MISS</td>
<td>Miss</td>
</tr>
<tr>
<td>DR.</td>
<td>Dr.</td>
</tr>
</tbody>
</table>

---

### Creating References to Siebel CRM Web Services

You must create Oracle Sales Cloud references to the Siebel CRM Web Services in the Application Composer, as required for the integration. When you register the first Web Service reference in Oracle Sales Cloud, you must create a new credential key. Oracle Sales Cloud uses the key to authenticate the Web Service calls to Siebel CRM.
To create Web Service references:

1. Sign in to Oracle Sales Cloud.
2. Click Navigator > Tools > Application Composer.
3. Select Common from the Application drop-down list.
4. Click Web Services on the Overview page.
5. Click Create Web Service Reference icon on the Web Services page.
6. Enter the following information on the Create SOAP Web Service Connection page:

   a. Web Service Name: O_INT_SBL_SelfServiceAddress.
   b. WSDL URL: https://<Siebel CRM>:<port>/ecommunications_enu/<WSDL name for SelfServiceAddress>.
   c. Click Read WSDL.
   d. Select Invoke with separate user credentials over SSL, in the Security area, Security Scheme.
   e. Create a credential key as follows, if the key is not available.
      • Click the plus (+) icon next to the Credential Key drop-down list, and enter the following:
      • Credential Key: SBL_<username>_KEY.
      • User Name: <Siebel CRM user name>.
      • Password: <user password>.
   f. Select the Siebel CRM credential key that is created, from the Credential Key drop-down list.
   g. Select the Disable time stamp verification check box.
   h. Click Save and Close.

Customizing Objects

Defining Security Policies for Custom Objects

Grant the necessary privileges to salespeople for them to access the features in Oracle Sales Cloud for Communications. You can grant privileges to sales representative, sales managers, sales administrators, and the sales VP. The custom objects that require security settings are:

- Integration Configuration
- Siebel CRM Customer Match
- Integration Map Lookup
- Billing Profiles

Creating Custom Job Roles

Job roles refer to the job functions which users must perform in an organization. Job roles provide users with access to the application functions and to the data that is required to perform the role. Each job role inherits a corresponding application role with the same name, including functional and data privileges for the related job role. The following table lists the application roles that can be inherited and the corresponding new job roles:

<table>
<thead>
<tr>
<th>Source Role Code</th>
<th>Role Name</th>
<th>Copied Role Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORA_ZBS_SALES_ADMINISTRATOR_JOB</td>
<td>Sales Administrator Custom</td>
<td>TELCO_ADMIN_CUSTOM</td>
</tr>
</tbody>
</table>
You must duplicate roles to provide security for custom objects. Perform the following procedure to duplicate each role.

1. Sign in as a Setup user and navigate to Tools Security Console.
2. Navigate through Administration > Roles > Roles Preferences.
3. Specify the following roles on the Roles Preferences page:
   - Copied Role Name Prefix: Telco
   - Copied Role Name Suffix: Custom
   - Copied Role Code Prefix: TELCO_
   - Copied Role Code Suffix: _CUSTOM
4. Select the Enable edit of data security policies and Enable edit of user membership check boxes.
5. Click Save.
6. Enter the source role code in the Search field, on the Roles tab.
7. Click the down arrow for the selected application in Search Results, and select Copy Role.
8. Select Copy top role and inherited roles in the Copy Options dialog box, and click Copy Role.
9. Edit the values for Role Name and Role Code on the Copy Role: Basic Information page.
10. Enter the appropriate information in the Description field for the copied role.
11. Click Summary and Impact Report.
12. Click Submit and Close, and then click OK.
13. Click Role Copy Status, on the Administration tab.
14. Verify the status of the copied role on the Role Copy Status page.

The status must show as Complete. Use the custom roles in job roles for users only while importing employees.

**Note:** Post custom role creation, ensure to run the Run User and Roles Synchronization Process FSM task, to sync the new roles. For more information, refer to the Define Synchronization of Users and Roles from LDAP chapter in the Implementing Common Features for Oracle SCM Cloud guide.

### Providing Access to Custom Objects

You can modify the newly created custom roles for each object. Salespeople with roles such as sales representative, sales manager, sales vice president, or administrator can access the following:

- Create
- View
- View All
- Update
- Update All
Salespeople with any role can access the Integration Configuration, Integration Map Lookup, and Siebel CRM Customer Match objects. Sales representatives, sales manager, sales vice president, and sales administrators can access billing profiles. However, only sales representatives cannot access Delete and Delete All.

To grant access for each object:

1. Activate a sandbox.
2. Navigate to the Security section of the object in Application Composer.
3. Grant access to different roles.
4. Publish the sandbox.

Hiding the Sales Coach Feature and Sales Coach Setup

As an administrator, if you do not want customers to view custom objects Sales Coach and the Sales Coach setup, you can hide them. While hiding the Sales Coach feature and the Sales Coach setup make sure that users do not have access to View and View All.

- To hide Sales Coach do the following:
  - From the Security section of the object in Application Composer, remove the following access:
    - Master Data Management Application Administrator, Customer Relationship Management Application Administrator.

- To hide the Sales Coach setup do the following:
  - From the Security section of the object in Application Composer, remove the following access:
    - Master Data Management Application Administrator, Customer Relationship Management Application Administrator.

Enabling Industry Layer Layouts

You must enable the layout to view the object pages. The layouts are initially inactive. Duplicate the layouts to activate them. You can modify layouts for account, contact, and integration map lookup.

Some subtabs, fields, or regions that are present in the standard Oracle Sales Cloud layouts may be disabled in the industry layer layouts. As an administrator you must edit the industry layer layouts and manually add the subtabs, fields, or regions.

If the Siebel CRM integration is not enabled, you can skip the following layouts Siebel Account Integration Layout, Siebel Opportunity Integration Layout, and Contract Renewal Siebel Integration Layout.

You must duplicate account layouts for customers to view profiles such as billing, exemption, fraud, and financial profiles. The duplication enables fields such as Forecast and Close Date. You must duplicate the following layouts for opportunity, to enable the update opportunity functionality:

- Contract Renewal Siebel Integration Layout
- Siebel Opportunity Integration Layout

**Note:** Siebel CRM Full Window replaces some functions of the subtabs for the account and opportunity objects. Don’t add the following subtabs to the layouts:
- Account: Quotes, Contracts, Trouble Tickets
- Opportunity: Quotes, Latest Quote
Perform the following steps to enable a layout:

1. Sign in to the application as an administrator.
2. Create and activate a sandbox with the name ORATCLayouts.
3. Click **Duplicate** to duplicate the inactive layouts listed in the following table.

<table>
<thead>
<tr>
<th>Object</th>
<th>Page</th>
<th>Layout Name</th>
<th>Duplicate Layout Name</th>
<th>Layout Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integration Configuration</td>
<td>Landing</td>
<td>ORATC Landing Layout</td>
<td>ORATC Landing Page Layout</td>
<td>Displays the Landing page for integration configuration records with the following fields: Configuration ID, Remote Application, Key, Value,</td>
</tr>
<tr>
<td>Integration Configuration</td>
<td>Create</td>
<td>ORATC Create layout</td>
<td>ORATC Creation Page Layout</td>
<td>Displays the Create page for integration configuration records with the following fields: Remote Application, Key, Value, Configuration ID.</td>
</tr>
<tr>
<td>Integration Configuration</td>
<td>Detail</td>
<td>ORATC Detail Layout</td>
<td>ORATC Detail Page Layout</td>
<td>Displays the Detail page for integration configuration records with the following fields: Remote Application, Key, Value, Configuration ID, Last Updated By, Last Update Date.</td>
</tr>
<tr>
<td>Integration Configuration</td>
<td>Reusable</td>
<td>ORATC Reusable Search Layout</td>
<td>ORATC Reusable Search Page Layout</td>
<td>Displays the Reusable region for integration configuration records with search fields such as Remote Application and Key. The search result region includes fields: Remote Application, Key, Value, Configuration ID.</td>
</tr>
<tr>
<td>Integration Map Lookup</td>
<td>Landing</td>
<td>ORATC Landing Layout</td>
<td>ORATC Landing Page Layout</td>
<td>Displays the Landing page for integration map lookup records with the following fields: Remote Application, Object Name, Object Attribute, Source Value, Source Parent Value, Remote Value.</td>
</tr>
<tr>
<td>Integration Map Lookup</td>
<td>Create</td>
<td>ORATC Create Layout</td>
<td>ORATC Creation Page Layout</td>
<td>Displays the Create page for integration map lookup records with the following fields: Remote Application, Object Name, Object Attribute, Source Value, Source Parent Value, Remote Value.</td>
</tr>
<tr>
<td>Object</td>
<td>Page</td>
<td>Layout Name</td>
<td>Duplicate Layout Name</td>
<td>Layout Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>------</td>
<td>------------------------------</td>
<td>-----------------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Integration Map Lookup</td>
<td></td>
<td>ORATC Detail Layout</td>
<td>ORATC Detail Page</td>
<td>Displays the Detail page for integration map lookup records with the following fields: Lookup ID, Remote Application, Object Name, Object Attribute, Source Value, Source Parent Value, Remote Value.</td>
</tr>
<tr>
<td>Integration Map Lookup</td>
<td></td>
<td>ORATC Reusable Search Layout</td>
<td>ORATC Reusable Search Page Layout</td>
<td>Displays the Reusable region for integration map look up.</td>
</tr>
<tr>
<td>Account</td>
<td></td>
<td>ORATC Detail Layout</td>
<td>ORATC Detail Page</td>
<td>Displays the Detail page for account records with industry-specific fields or regions and subtabs enabled such as account class, multiple address, financial profile, billing profile, and exemption profile. This layout is displayed if the Siebel CRM integration is disabled.</td>
</tr>
<tr>
<td>Opportunity</td>
<td></td>
<td>Siebel Opportunity Integration Layout</td>
<td>Siebel Opportunity Integration Detail Page Layout</td>
<td>Displays the Detail page for new contract opportunity records when the integration is enabled. This layout has Siebel CRM integration-specific actions and fields enabled, such as Open Quotes, Revenue Forecast, Revenue Close Date.</td>
</tr>
</tbody>
</table>
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<table>
<thead>
<tr>
<th>Object</th>
<th>Page</th>
<th>Layout Name</th>
<th>Duplicate Layout Name</th>
<th>Layout Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity</td>
<td>Detail</td>
<td>Contract Renewal</td>
<td>ORATC Contract Renewal Layout</td>
<td>Displays the Detail page for contract renewal opportunity records that are created from Siebel CRM, when Siebel CRM integration is disabled. This layout has industry-specific contract renewal fields enabled, such as Contract Name, Term In Months, End Date, Price Discount Percentage.</td>
</tr>
<tr>
<td>Opportunity</td>
<td>Detail</td>
<td>Contract Renewal Siebel Integration Layout</td>
<td>Contract Renewal Siebel Integration Detail Page Layout</td>
<td>Displays the Detail page for contract renewal opportunity records that are created in Siebel CRM, when Siebel CRM integration is enabled. This layout has Siebel CRM integration-specific actions and fields enabled, such as Open Quotes, Revenue Forecast, Revenue Close Date. Additionally, this layout has industry-specific fields enabled, such as Contract Name, Term In Months, End Date, Price Discount Percentage.</td>
</tr>
</tbody>
</table>

4. Use the advanced expressions as listed in the following table for each of the duplicated layouts.

<table>
<thead>
<tr>
<th>Object and Layout Name</th>
<th>Advanced Expression</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account: Siebel Account Integration Layout</td>
<td>return (('SiebelAccountIntegrationLayout') == __ORATC__getLayoutName())?true:false</td>
</tr>
<tr>
<td>Account: ORATC Detail Layout</td>
<td>return ('ORATCDetailLayout') == __ORATC__getLayoutName()?true:false</td>
</tr>
<tr>
<td>Opportunity: Siebel Opportunity Integration Layout</td>
<td>return (('SiebelOpportunityIntegrationLayout') == __ORATC__getLayoutName())?true:false</td>
</tr>
</tbody>
</table>
| Opportunity: Contract Renewal Layout | return (('ContractRenewalLayout') == __ORATC__getLayoutName())?true:
| Opportunity: Contract Renewal Siebel Integration Layout | return (('ContractRenewalSiebelIntegrationLayout') == __ORATC__getLayoutName())?true:

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5. Click **Reorder Layouts**, to ensure that the layout with advanced expression appears at the beginning of the table.

## Importing Employee Resources in Oracle Sales Cloud for Communications

An account or user details of an employee is created in Oracle Sales Cloud which helps salespeople to perform their duties. You can import employee data using the File Import option. Before you import employee data, you must create fields and modify pages.

This topic describes how to:

1. Create fields and modify pages.
2. Map employees with their organization.
3. Translate custom fields.

To create fields and modify pages:

1. Sign in to Oracle Sales Cloud as an administrator.
2. Create and activate a sandbox.
3. Navigate to Application Composer, from the Application drop-down list select **Common > Standard Objects > Resource**, and click **Fields**.
4. Create fields for Remote Application, Employee ID, Position ID, and Organization ID with values detailed in the following table.

> **Note:** While creating fields, make sure that you select the option Include in Service Payload.

<table>
<thead>
<tr>
<th>Details</th>
<th>Values for Remote Application</th>
<th>Values for Employee ID</th>
<th>Values for Position ID</th>
<th>Values for Organization ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>Field Type</td>
<td>Text</td>
<td>Text</td>
<td>Text</td>
<td>Text</td>
</tr>
<tr>
<td>Display Label</td>
<td>Remote Application</td>
<td>Employee ID</td>
<td>Position ID</td>
<td>Organization ID</td>
</tr>
<tr>
<td>Name</td>
<td>RemoteSystemID</td>
<td>EmployeeID</td>
<td>PositionID</td>
<td>OrganizationID</td>
</tr>
<tr>
<td>Display Width</td>
<td>20</td>
<td>20</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>Display Type</td>
<td>Simple Text Box</td>
<td>Simple Text Box</td>
<td>Simple Text Box</td>
<td>Simple Text Box</td>
</tr>
<tr>
<td>Constraints</td>
<td>Updatable, Searchable, Indexed</td>
<td>Updatable, Searchable, Indexed</td>
<td>Updatable, Searchable, Indexed</td>
<td>Updatable, Searchable, Indexed</td>
</tr>
<tr>
<td>Maximum Length</td>
<td>80 characters</td>
<td>80 characters</td>
<td>80 characters</td>
<td>80 characters</td>
</tr>
<tr>
<td>API</td>
<td>RemoteSystemID_c</td>
<td>EmployeeID_c</td>
<td>PositionID_c</td>
<td>OrganizationID_c</td>
</tr>
</tbody>
</table>

27
5. Modify the pages to map the employees with their organization:
   a. Click Desktop Pages > Edit Summary Form.
   b. In the Edit Details Page-Summary Form, add the following fields in the Selected Field section:
      - Employee ID
      - Position ID
      - Remote Application
      - Organization ID

6. Publish the sandbox.

After you create the fields, you must generate artifacts for custom fields, and import the resources using the File Import option.

**Mapping Employees with Organizations**

When you import an employee from Siebel CRM to Oracle Sales Cloud, you import the employee and her organization. Importing organizations enables mapping of objects such as account, contact, and opportunities with the corresponding organizations. When salespeople create objects in Oracle Sales Cloud the records are synchronized with the appropriate position and organization information in Siebel CRM.

Setting up organizations is optional in Siebel CRM. Organizations control the access that employees have to data. They also enable viewing of employees in the context of their active position within the organizational hierarchy. For more information about organization mapping, see Integrating Oracle Sales Cloud with Siebel CRM (1670543.1) on My Oracle Support.

**Translating Custom Fields**

Translate the custom fields of a resource object to accommodate supported languages. For more information, see Translations of Custom Fields for Resource Object in Collateral for Oracle Sales Cloud for Communications (2099189.1) on My Oracle Support.

Perform the following steps for each language, except English. Repeat the steps for Position ID and Remote Application. To translate custom fields:

1. Create a sandbox: TranslateResourceFields, and set it to active.
2. Change language to supported language using Set Preferences.
3. From the Navigator, open User Interface Text in Tools.
4. Click Search and Replace.
5. Enter the value to be changed: Employee ID and its translation.
6. Click Preview Changes.
7. Retain only the required employee ID from the list of matching IDs.
8. Click Save and Close.
9. Click Yes if you receive the following warning:
   o Live changes cannot be undone. Changes are saved directly to this environment, and not to a sandbox. You cannot undo them. Are you sure you want to save?


**Related Topics**

- Collateral for Oracle Sales Cloud for Communications
- Integrating Oracle Sales Cloud with Siebel CRM
5 Configuring Sales Configurable Home Page

Customizing Sales Configurable Home Page

Sales executives use the Sales Configurable Home page to review key numbers for the quota achieved, in the dashboard. The infolets on the home page provide salespersons with custom reports. The Communications Infolets page is enabled by default for customers.

Hiding Dashboards

You can hide the existing dashboard and add the required infolets on the page.

To hide the existing dashboard and enable sales configurable home page:

1. Sign in to Oracle Sales Cloud Fuse UI as a user with Application Implementation Consultant job role.
2. Create and activate the sandbox.
3. Click Navigator > Tools > Structure.
4. Expand Sales and click Dashboard.
   A configuration page appears.
5. Set the value to No, in the Visible field.
6. Click Save and Close.
7. Publish the sandbox.

Adding Specific Infolets on the Home Page

Salespeople can configure the sales home page and view the reports or infolets that they require. The Infolets home page displays six infolets.

To add specific infolets to the home page:

1. Sign in to Oracle Sales Cloud as an Application Implementation Consultant.

   Note: You can enable infolets for salespeople including roles such as sales manager, and sales VP. To enable the infolets you must sign in as an Application Implementation Consultant with those additional roles.

2. Repeat the following steps, to add reports for both Sales VP and Sales Manager job roles:
   a. Create and activate the sandbox.
   b. Open Page Composer and in the Application menu, and click Customize Pages.
   c. Edit the job role:
      i. Select Job Role in the Layer column.
      ii. Select a job role from the drop-down list.
      iii. Click OK.
3. Create six infolets for each role:
   a. Open the Infolet Repository menu and select Create Infolet.
   b. Provide details on Create Infolet page fields, as listed in the following table.

<table>
<thead>
<tr>
<th>Infolet Title</th>
<th>Dimensions</th>
<th>Back View</th>
<th>Expanded View</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual vs. Quota</td>
<td>1 x 1</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Contract Renewals</td>
<td>1 x 1</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>New Contracts</td>
<td>1 x 1</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Renewal Rate</td>
<td>1 x 1</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Bundled Deals</td>
<td>1 x 1</td>
<td>No</td>
<td>No</td>
</tr>
<tr>
<td>Stalled Deals</td>
<td>1 x 1</td>
<td>No</td>
<td>No</td>
</tr>
</tbody>
</table>

4. Click Add Content and add reports to each infolet, navigate to the report path and click Add for each report.

<table>
<thead>
<tr>
<th>Infolets</th>
<th>Report Path for Sales VP or Manager</th>
<th>Report Path for Sales Representatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual versus Quota</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, orac, and Tile: Actuals vs Quota.</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, orac, Sales Representative, and Tile: Actuals vs Quota.</td>
</tr>
<tr>
<td>Contract Renewals</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, orac, and Tile: Contract Renewals.</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, orac, Sales Representative, and Tile: Contract Renewals.</td>
</tr>
<tr>
<td>Renewal Rate</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, orac, and Tile: Renewal Rate.</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, orac, Sales Representative, and Tile: Renewal Rate.</td>
</tr>
<tr>
<td>Bundled Deals</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, orac, and Tile: Bundled Deals.</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, orac, Sales Representative, and Tile: Bundled Deals.</td>
</tr>
<tr>
<td>Stalled Deals</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, orac, and Tile: Stalled Deals.</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, orac, Sales Representative, and Tile: Stalled Deals.</td>
</tr>
</tbody>
</table>
5. After you add the infolet content, link the detailed report as follows:
   a. Open the Actions menu for the infolet.
   b. Click Link Detailed Report and then click Add Content.
   c. Navigate to the report path and click Add for each report.

   Use the details in the following table to configure the report paths for an infolet.

<table>
<thead>
<tr>
<th>Infolet</th>
<th>Report Path for Sales VP or Manager</th>
<th>Report Path for Sales Representatives</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual versus Quota</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, oratc, Dashboards, and Actuals vs Quota.</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, oratc, Sales Representative, Dashboards, and Actuals vs Quota.</td>
</tr>
<tr>
<td>Contract Renewals</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, oratc, Dashboards, and Contract Renewals.</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, oratc, Sales Representative, Dashboards, and Contract Renewals.</td>
</tr>
<tr>
<td>New Contracts</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, oratc, Dashboards, and New Contracts.</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, oratc, Sales Representative, Dashboards, and New Contracts.</td>
</tr>
<tr>
<td>Renewal Rate</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, oratc, Dashboards, and Renewal Rate.</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, oratc, Sales Representative, Dashboards, and Renewal Rate.</td>
</tr>
<tr>
<td>Bundled Deals</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, oratc, Dashboards, and Bundled Deals.</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, oratc, Sales Representative, Dashboards, and Bundled Deals.</td>
</tr>
<tr>
<td>Stalled Deals</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, oratc, Dashboards, and Stalled Deals.</td>
<td>Click Reports and Analytics, BiPresentationServer, Shared Folders, Extension, oratc, Sales Representative, Dashboards, and Stalled Deals.</td>
</tr>
</tbody>
</table>

6. Open the Infolet Repository menu, and hide the earlier infolets by deselecting the infolets.

7. Close the Page Composer and publish the sandbox.

Verifying the Dashboard Configuration

After you add the infolets that you require, verify the dashboard configurations.

To verify the dashboard configuration:

1. Sign in to the application with the Application Implementation Consultant role.
2. Click Navigator > Tools > Scheduled Processes.
3. Schedule new processes for the following:
   - Refresh Denormalized Time Dimension Table for business intelligence.
   - Refresh Denormalized Product Catalog Table for business intelligence.
6 Configuring Shared Addresses for Integration with Siebel CRM

Configuring Shared Addresses Among Accounts and Contacts

You must configure shared address to share addresses among accounts and contacts in Oracle Sales Cloud. When an account or contact is synchronized a reference to the same address is created in Siebel CRM. You can search an address with the criterion address line 1 + address line 2 + city + state + postal code + country. Only exact matches are considered for sharing addresses. Address 1 and postal code are required for sharing addresses. You can share an address only in the create flow in Oracle Sales Cloud. To configure shared address, perform the following steps:

1. Create a record in the Integration Configuration Object.
2. Create references to Siebel CRM Web Services.

Creating a Record in Integration Configuration Object

You can create records in the Integration Configuration object. Use the following key to create records:

- **Remote Application**: SIEBEL
- **Key**: SHARE_ADDRESSES_ACCOUNTS_CONTACTS
- **Value**: Y

If the value is set to Y, then the following occurs:

- The shared address function is enabled.
- Addresses are shared and original system references for addresses are created in Oracle Sales Cloud.

If the value is set to any other value or if the record doesn’t exist in the Integration Configuration object, then the following occurs:

- The Siebel Integration Shared Address feature is disabled.
- Addresses are not shared in Oracle Sales Cloud and original system references for addresses aren’t created in Oracle Sales Cloud.

Creating References for Services

You must create an address service reference from Oracle Sales Cloud references to the Siebel CRM Web Services in the Application Composer.

Enter the following information on the Create SOAP Web Service Connection page:

1. **Web Service Name**: O_INT_SBL_SWIAddressServices
2. WSDL URL: https://<Siebel CRM>:<port>/e.communications_enu/<WSDL name for SWIAddressServices>
3. Credential Key: SBL_<username>_KEY.
4. Select Invoke with separate user credentials over SSL, in the Security area, Security Scheme.
5. Select the Disable time stamp verification check box.
6. Click Save and Close.

Registering Oracle Sales Cloud Web Services

You must create a reference to the Oracle Sales Cloud Trading Community Location Web Service with Oracle Sales Cloud applications. Use the Common application in Application Composer to create the reference.

To create Web Service references:

1. Sign in to Oracle Sales Cloud.
2. Click Navigator > Tools > Application Composer.
3. Select Common from the Application drop-down list.
4. Click Web Services on the Overview page.
5. Click Create Web Service Reference icon on the Web Services page.
6. Enter the following on the Create SOAP Web Service Connection page:
   a. Web Service Reference Name: O_INT_SBL_OSCLocationService
   c. Click Read WSDL.
   d. Select Invoke with current user credentials using SAML, in the Security Policy area.
   e. Select the Disable time stamp verification check box.
   f. Click Save and Close.

For more information, see Integrating Oracle Sales Cloud with Siebel CRM (1670543.1) on My Oracle Support.
Chapter 7

7  Configuring Siebel Quotes for Integration with Oracle Sales Cloud

Configuring Siebel CRM Quotes to Update Oracle Sales Cloud Opportunities

You must configure quotes in Siebel CRM to the corresponding opportunities in Oracle Sales Cloud so that salespeople can use the update opportunity functions. When salespeople use the Siebel CRM Update Opportunity function the opportunity in Siebel CRM and Oracle Sales Cloud is automatically updated.

You must refer to topics in Integrating Oracle Sales Cloud with Siebel CRM (1670543.1) on My Oracle Support, to enable updating opportunities from a quote.

You can update opportunities from a quote by:

- Performing specific tasks in Siebel CRM
- Creating a new record in integration configuration
- Creating a synchronization user in Oracle Sales Cloud

Tasks in Siebel CRM

The following table lists the tasks that you perform in Siebel CRM, the topics you have to refer to, and the files that you have to use.

<table>
<thead>
<tr>
<th>Task in Siebel CRM</th>
<th>Topics</th>
<th>Files to Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set up Outbound Web Service again and add namespace to integration objects</td>
<td>Modifying the Outbound Web Service</td>
<td>None</td>
</tr>
<tr>
<td>Import and update workflow</td>
<td>Importing and Configuring the Required Workflow</td>
<td>WF - SIS OM Update Revenue.sif</td>
</tr>
<tr>
<td></td>
<td></td>
<td>O_INT_OSC_DeleteRevn_DataMap.XML</td>
</tr>
<tr>
<td>Import SIF files</td>
<td>Importing Required SIF Files</td>
<td>BC_Revenue.sif</td>
</tr>
<tr>
<td></td>
<td></td>
<td>IO_SWIOpportunityIO.sif</td>
</tr>
<tr>
<td>Set log level</td>
<td>Enabling Workflow Logging</td>
<td>None</td>
</tr>
</tbody>
</table>
Creating New Records in Integration Configuration

Create a new record in Integration Configuration for the integration user, if the following key-value pair isn’t available:

- **Remote Application**: SIEBEL
- **Key**: UPDATE_OPTY_INTEGUSER
- **Value**: SYNCAGENT

The user is configured when you import the SIS OM Update Revenue work flow.

Creating a Synchronization User

You must create a synchronization user and use it in the Update Opportunity operation called SYNCAGENT. You can create the Sales Administrator Resource Role while importing an employee.

To create a synchronization user:

1. Sign in to Oracle Sales Cloud as a user with privileges to create and manage users.
2. In the Setup and Maintenance work area, go to the following:
   - Offering: Sales
   - Functional Area: Users and Security
   - Task: Manage Users
3. On the Search Person page, click Create.
4. On the Create User page, enter the following.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>User</td>
</tr>
<tr>
<td>First Name</td>
<td>SyncAgent</td>
</tr>
<tr>
<td>E-mail</td>
<td><a href="mailto:syncagentuser@dummy.oracle.com">syncagentuser@dummy.oracle.com</a></td>
</tr>
<tr>
<td>User Name</td>
<td>SYNCAGENT</td>
</tr>
<tr>
<td>Person Type</td>
<td>Employee</td>
</tr>
<tr>
<td>Legal Employee</td>
<td>Select a value from the drop-down list.</td>
</tr>
<tr>
<td>Business Unit</td>
<td>Select a value from the drop-down list.</td>
</tr>
<tr>
<td>Resource Role</td>
<td>Sales Administrator Resource Role</td>
</tr>
<tr>
<td>Organization</td>
<td>Select the root organization.</td>
</tr>
</tbody>
</table>
### Verifying the Synchronization User Account

After you create a synchronization user, verify the synchronization user account. To verify the synchronization user account:

1. Sign in to Oracle Sales Cloud, click Navigator, and then click Security Console.
2. Click the Users sub tab and search for the SYNCAGENT user.
3. Click the SYNCAGENT link beside User Login.
4. Verify that the SYNCAGENT user has following roles:
   - Sales Administrator Custom
   - Employee
   - Resource
5. Sign in to Oracle Sales Cloud as the synchronization user.
6. Click **Navigator, Tools**, and verify that Integration Configuration and Integration Map Lookup are present.
7. Click **Navigator, Accounts**, and click the link to any existing account record to ensure that accounts can be viewed by the SYNCAGENT user.
8. (Optional) Verify that you can create a new account using the SYNCAGENT login.
   a. Sign in to Oracle Sales Cloud as the SYNCAGENT user.
   b. Create an account.
   c. Click the Team tab of the newly created account and verify that the SYNCAGENT user is a member of the team.
8 Configuring Assets

Configuring Assets

This topic describes the tasks that you must perform to be able to configure and manage assets.

You must perform the following tasks in the given order.

1. Duplicate Layouts
2. Rename Asset Subtab
3. Enable Standard Fields Searchable
4. Make Asset fields Read-Only (Optional)
5. Rename Standard Fields
6. Add Lookup Values to Status Field

Duplicate Layouts

You must duplicate and activate the default inactive layouts to be able to view the object pages.

Note: To enable the changes in the Account layout, you must duplicate the Account Detail layout and add the advanced expression mentioned in the Enabling Industry Layouts topic.

To enable a layout:

1. Sign in to Oracle Sales Cloud as an application implementation consultant.
2. Create and activate a sandbox.
3. In Application Composer, select the Sales Object tags check box and navigate to Standard Objects > Asset > Pages.
4. On the Asset: Pages page, click Simplified Pages.
5. Select the Layout Name which must be duplicated, from the Landing Page, Creation Page, and Details Page Layouts as indicated in the following table.

<table>
<thead>
<tr>
<th>Object</th>
<th>Landing/Detail Page</th>
<th>Layout Name</th>
<th>Duplicate Layout Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Asset</td>
<td>Landing</td>
<td>ORATC Landing</td>
<td>ORATC Landing Page Layout</td>
<td>Landing page for asset records with vertical-specific fields</td>
</tr>
<tr>
<td></td>
<td>Create</td>
<td>ORATC Create</td>
<td>ORATC Create Page Layout</td>
<td>Create page for asset records with vertical-specific fields</td>
</tr>
<tr>
<td></td>
<td>Detail</td>
<td>ORATC Detail</td>
<td>ORATC Detail Page Layout</td>
<td>Detail page for asset records with vertical-specific fields</td>
</tr>
</tbody>
</table>

6. Go to Actions > Duplicate.
7. On the Duplicate Layout pop-up window, enter the new layout name in the New layout name field.
8. Click Save and Close.
9. Publish the sandbox.

**Rename Asset Subtab**

You must rename the default Asset subtab to Owned Assets subtab for Assets.

To rename the default Asset subtab:

1. Sign in to Oracle Sales Cloud as an application implementation consultant.
2. Create and activate a sandbox.
3. In Application Composer, select the Sales Object tags check box and navigate to Standard Objects > Account > Pages.
4. From the Account: Pages, click the ORATC Detail Page Layout.

> Note: If you have duplicated the ORATC Detail Layout with a different name, open your configured duplicate layout and then rename the subtab.

6. Rename the Assets subtab to **Owned Assets**.
7. Click **Done**.
8. Publish the sandbox.

**Make Standard Fields Searchable**

You must make the standard fields Asset Number and End Date as searchable.

To make standard fields searchable:

1. Sign in to Oracle Sales Cloud as an application implementation consultant.
2. Create and activate a sandbox.
3. In Application Composer, select the Sales Object tags check box and navigate to Standard Objects > Asset > Fields.
4. On the Fields page, click **Standard**.
5. Select **Asset Number** and go to **Action Edit**.
6. On the Edit Standard Field: Asset Number page, in Constraints, select the check box for Searchable, if it is unchecked.
7. Click **Save and Close**.
8. Repeat steps 5 to 7 for **End Date**.
9. Publish the sandbox.

**Make Asset Fields Read-Only**

This is an optional step. As an application implementation consultant, you may want to make specific fields read-only depending on the user role that you want to allocate. For example, you may want to make asset fields read-only when asset data is generated from an external application and must not be editable by sales agents in Oracle Sales Cloud. To make the fields read-only based on the user role, you must obtain the role code of the user.

To obtain the role code:

1. Sign in as a user with access to Security Console.
3. On the Roles page, enter the required role in the Search field.
4. From the Search Results, note the role code.
The following table lists the vertical and standard fields which can be made read-only.

<table>
<thead>
<tr>
<th>Vertical Fields</th>
<th>Standard Fields</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Asset Number</td>
<td>Parent Asset Number</td>
</tr>
<tr>
<td>Root Asset Number</td>
<td>Status</td>
</tr>
<tr>
<td>Service Account Name</td>
<td>Quantity</td>
</tr>
<tr>
<td>Service Address</td>
<td>End Date</td>
</tr>
<tr>
<td>Billing Profile ID</td>
<td>Install Date</td>
</tr>
<tr>
<td>Billing Account Name</td>
<td>Start Date</td>
</tr>
<tr>
<td>Suspended Date</td>
<td>Purchase Unit Price</td>
</tr>
<tr>
<td>Resumed Date</td>
<td></td>
</tr>
<tr>
<td>One Time Net Charge</td>
<td></td>
</tr>
<tr>
<td>Fixed Recurring Charge</td>
<td></td>
</tr>
<tr>
<td>Fixed Recurring Period</td>
<td></td>
</tr>
<tr>
<td>Usage Unit of Measure</td>
<td></td>
</tr>
<tr>
<td>Applied Discount Amount</td>
<td></td>
</tr>
<tr>
<td>Applied Discount Percent</td>
<td></td>
</tr>
<tr>
<td>Agreement ID</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** For the list of standard fields and their renamed vertical field names, refer to the Rename Standard Fields section in this topic.

To make vertical fields read-only:

1. Sign in to Oracle Sales Cloud as an application implementation consultant.
2. Create and activate a sandbox.
3. In Application Composer, select the Sales Object tags check box and navigate to Standard Objects > Asset > Server Scripts.
5. On the Object Functions page, go to Action > Add.
6. On the Create Object Function page, enter the following information for the given fields:
   - Function Name: isFieldUpdatable
     - Note: Function name must be exact.
   - Returns: Boolean
   - Function Body: Enter the following groovy.
     ```groovy
def secCtx = adf.context.getSecurityContext()
if(secCtx.isUserInRole('<Code for User Role>')) {
    return false
} else {
    return true
}
```
     - Note: The value of the Code for user Role must be replaced with the value obtained from the steps to obtain the role code.

7. Click Save and Close.
8. Publish the sandbox.

To make standard fields read-only:

1. Sign in to Oracle Sales Cloud as an application implementation consultant.
2. Create and activate a sandbox.
3. In Application Composer, select the Sales Object tags check box and navigate to Standard Objects > Asset > Fields.
5. Select the required field and go to Action > Edit.
6. On the Edit Standard Field page, click the Expression Builder image besides the Updatable check box.
7. In the Groovy pop-up window, enter the following groovy.
   ```groovy
def secCtx = adf.context.getSecurityContext()
if(secCtx.isUserInRole('<Code for User Role>')) {
    return false
} else {
    return true
}
```
   - Note: The value of the Code for user Role must be replaced with the value obtained from the steps to obtain the role code. If you have multiple users, use OR(||) operator in the If condition.
8. Click OK and then click Save and Close.
9. Publish the sandbox.

Rename Standard Fields

To rename the default standard fields, you must map them to the specified vertical field names. The following table lists the default standards fields and their new vertical field names.
### Standard Field | Vertical Field
--- | ---
Serial Number | Service ID
End Date | Service End Date
Start Date | Service Start Date
Purchase Unit Price | Usage Net Charge Per Unit

To rename standard fields:

1. Sign in to Oracle Sales Cloud as an application implementation consultant.
2. Create and activate a sandbox.
3. In Application Composer, select the Sales Object tags check box and navigate to Standard Objects > Asset > Fields.
4. Click Standard Fields.
5. On the Fields page, click Standard.
6. Select the required field and go to Action > Edit.
7. On the Edit Standard Field page, enter the required label in the Display Label field.
8. Click Save and Close.
9. Publish the sandbox.

### Add Lookup Codes to Status Field
You must add additional lookup values to the existing Asset Status field. To add lookup values:

1. Sign in as an administrator.
2. In the Setup and Maintenance work area, go to the Manage Standards Lookups task.
3. On the Manage Standard Lookups page, search for the Lookup Type ZCA_ASSET_STATUS.
4. Add the following new records in the Lookup Type:

<table>
<thead>
<tr>
<th>Lookup Code</th>
<th>Enabled</th>
<th>Start Date</th>
<th>Meaning</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SUSPENDED</td>
<td>Checked</td>
<td>6/19/10</td>
<td>Suspended</td>
<td>Suspended Asset Status</td>
</tr>
<tr>
<td>DISCONNECTED</td>
<td>Checked</td>
<td>6/19/10</td>
<td>Disconnected</td>
<td>Disconnected Asset Status</td>
</tr>
<tr>
<td>TERMINATED</td>
<td>Checked</td>
<td>6/19/10</td>
<td>Terminated</td>
<td>Terminated Asset Status</td>
</tr>
</tbody>
</table>

5. Click Save and Close.

**Related Topics**

- Enabling Industry Layer Layouts in Oracle Sales Cloud for Communications
9 Frequently Asked Questions

How can I regenerate hierarchies for users created through File Import feature?

When you create users using the File Import feature, the hierarchies may be lost. Regenerate hierarchies for users that you create using the File Import feature.

To regenerate hierarchies:

1. Sign in as sales administrator.
3. Click Search in the Search field.
   A list of hierarchies appears.
4. Select Organization Hierarchy, and click Edit.
5. Click Action > Edit This Hierarchy Version > Save and Close.
6. Click Yes, when the warning appears.
7. Close the confirmation and sign out.

What do I do if a user account fails during an import?

If a user account fails during import, you must recreate the user account.

To recreate user accounts:

1. Sign in with an IT Security Manager role.
2. Go to Scheduled Process.
3. Search and manually run Send Pending LDAP Requests.

What do I do if an error occurs when configuring a complex product in Siebel CRM?

While configuring complex products that have been added to a quote in Siebel Communications IP15 application, you may receive an error. The error might state that workflow process definition 0CM-1E3YC2 cannot be executed.

To enable configuration of a complex product in Siebel CRM:

1. Sign in to Siebel CRM.
2. From Administration-Runtime events in the site map, query for Subevent-EventMethodPMTConfigure.
3. Navigate to Action set name for the Object Quote.
4. Deactivate the workflow name: Workflow_0CM-1E3YC2_Wait for Button Click_Click.DEFAULT.
5. From the Settings menu, click Reload Run time events.
6. Sign out of Siebel CRM, and then sign in again.
What do I do if the Siebel CRM window is blank in Internet Explorer?

Use browser version 11.x to view the full Siebel CRM window. The Siebel CRM window isn’t supported in browser versions 10.x and 9.x. When you click a button in account or opportunity that opens a Siebel CRM window, you may view a blank page in Internet Explorer.

Can I import employee resources if the file-based import isn't successful?

Yes. You can manually map employee data in Oracle Sales Cloud. The following procedure is optional if you have mapped the employee resource records earlier.

To manually map employee data in Oracle Sales Cloud:

1. Sign in to Oracle Sales Cloud as an administrator.
2. Navigate to Setup and Maintenance.
3. Search for the Manage Resources task in the All Tasks pane, and then click the Go to Task icon in the Results list.
4. From Manage Resources, search for the name of the resource you want to map, and then select the record.
5. Provide the appropriate Siebel CRM values for the given user namely Employee ID, Organization ID, Position ID, Remote Application as per the SiebelCRMEmployeeExport.sql query.
6. Click Save, to save the record.

Why was the revenue line with a different currency deleted when I updated the opportunity from quotes?

When updating opportunities from quotes in Siebel CRM, revenue lines with currencies that are different from the opportunity header currency are deleted, if multicurrency isn’t enabled.

To enable multicurrency in opportunity revenue lines, perform the following steps:

1. Sign in to Oracle Sales Cloud.
2. Navigate to Setup and Maintenance.
3. Search for the task Manage Administrator Profile Values.
4. Search for the profile option code: MOO_REVN_ENABLE_MULTICURRENCY.
5. Update the existing value in the Profile Values section, if the values are not as follows:
   - Profile Level: Site
   - Profile Value: Yes

For more information about currency mapping, see Process of Enabling Multiple Currencies in Integrating Oracle Sales Cloud with Siebel CRM (1670543.1) on My Oracle Support.
Related Topics

- Integrating Oracle Sales Cloud with Siebel CRM

How can I enable multiple users to use the Update Opportunity function from Quotes?

Modify the Owner Delete property of the Revenue component as follows:

1. In Siebel Tools, lock the business component Revenue.
2. Locate the Owner Delete property, and ensure that the check box is set as FALSE.
3. Compile the object.
Glossary

**UOM**
Abbreviation for unit of measure. A division of quantity that is adopted as a standard of measurement.

**WSDL**
Abbreviation for Web Services Description Language. It is an XML format that provides a model for describing Web services.