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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 Ⰰ 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 administrators and implementors involved in setting up and using Oracle Sales Cloud for Higher Education.

You must perform the implementation steps covered in this guide either while implementing or after implementing Oracle Sales Cloud. The implementation and configuration steps described in this guide are applicable only to the Higher Education application. This guide does not cover the implementation activities for Oracle Sales Cloud. Depending on your specific use cases, the implementation steps that you must perform may differ.

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>
</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 Getting Started with Extending Sales</td>
<td>Describes the common tasks to make application changes, using tools such as Application Composer and Page Composer.</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>Explains 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 implement user access to 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>
Related Topics

- Oracle Help Center
# Implementation Overview

## Setup Tasks List

This topic provides a summary of the tasks that you must perform to implement and configure the Higher Education application.

The following table lists the sequence of the tasks and the respective work area. The tasks are categorized based on the customization tools or composers that you must use to implement, customize, and extend your higher education application.

<table>
<thead>
<tr>
<th>Setup Activity</th>
<th>Work Area and Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Setup Roles and Users</td>
<td>Security Console</td>
</tr>
<tr>
<td></td>
<td>• Creating Job Roles</td>
</tr>
<tr>
<td></td>
<td>• Enabling Oracle Social Network for New Roles</td>
</tr>
<tr>
<td></td>
<td>Setup and Maintenance</td>
</tr>
<tr>
<td></td>
<td>• Creating Resource Roles</td>
</tr>
<tr>
<td></td>
<td>• Creating Role Provisioning Rules</td>
</tr>
<tr>
<td>Manage Users</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Assigning Resource Roles to Users</td>
</tr>
<tr>
<td></td>
<td>Application Composer</td>
</tr>
<tr>
<td></td>
<td>• Configuring Security Policy for Custom Objects</td>
</tr>
<tr>
<td>Configure Page Layouts</td>
<td>Application Composer</td>
</tr>
<tr>
<td></td>
<td>• Accessing and Duplicating Higher Education Layouts</td>
</tr>
<tr>
<td>Configure Standard Lookups</td>
<td>Setup and Maintenance</td>
</tr>
<tr>
<td></td>
<td>• Inquiry Team Function Lookup Type Configuration</td>
</tr>
<tr>
<td></td>
<td>• Organization Size Lookup Type Configuration</td>
</tr>
<tr>
<td></td>
<td>• Program Type, Institution, Campus, Admit Period, and Inquiry Source</td>
</tr>
<tr>
<td></td>
<td>• Optional Lookup Type Configuration</td>
</tr>
<tr>
<td></td>
<td>• Customizing Organization and Constituent Relationships Lookups</td>
</tr>
<tr>
<td>Configure Addresses</td>
<td>Setup and Maintenance</td>
</tr>
<tr>
<td></td>
<td>• Configuring Profile Values</td>
</tr>
<tr>
<td></td>
<td>• Configuring Address Style Formats</td>
</tr>
<tr>
<td></td>
<td>Application Composer</td>
</tr>
<tr>
<td></td>
<td>• Enabling Multiple Addresses</td>
</tr>
</tbody>
</table>
Setup Activity | Work Area and Tasks
--- | ---
Import Organizations, Constituents, and Inquiries | Application Composer
| • Generating Import or Export Artifacts
Setup and Maintenance | • Configuring and Downloading File Import Templates
| • Importing Data from Files
Configure Programs of Interest | Setup and Maintenance
| • Creating a Root Product Group
| • Configuring Programs of Interest
Configure Choice List Filters | Application Composer
| • Setting up Inquiry Admit Level Filter Based on Academic Level
| • Setting up Previous Schools Organizations Filter
Configure Saved Searches | Page Composer
| • Configuring Saved Searches
Enable Households Icon | Enabling Households Icon on the Navigator and Welcome Springboard

You must perform the steps provided in this guide in conjunction with or after completing the implementation steps described in the Oracle Sales Cloud Getting Started with Your Implementation guide.

**Terms and Definitions**

Oracle Sales Cloud for Higher Education uses terms that are referred to differently in Oracle Sales Cloud. The following table describes the difference in terminology.

<table>
<thead>
<tr>
<th>Term in Oracle Sales Cloud for Higher Education</th>
<th>Term in Oracle Sales Cloud</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Constituents</td>
<td>Contacts</td>
<td>Constituents in higher education are prospective students; contacts from an organization such as teachers, administrators, coaches or human resource representatives; and people related to prospective students such as parents, relatives, or friends.</td>
</tr>
<tr>
<td>Inquiries</td>
<td>Leads</td>
<td>Inquiries for prospective students refer to information related to a student’s academic interests, entry year, and academic level.</td>
</tr>
</tbody>
</table>
## Prerequisites

Oracle Sales Cloud for Higher Education leverages the Oracle Sales Cloud functionality to plan, manage and track student recruitment activities.

To set up your Higher Education application, you must perform the implementation and configuration steps described in this guide either while implementing or after implementing Oracle Sales Cloud.

<table>
<thead>
<tr>
<th>Term in Oracle Sales Cloud for Higher Education</th>
<th>Term in Oracle Sales Cloud</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organizations</td>
<td>Accounts</td>
<td>Organizations are high schools, community colleges, or other colleges or universities for students. Organizations can also be the place of employment for students who pursue part-time studies alongside their paid employment.</td>
</tr>
<tr>
<td>Programs of Interest</td>
<td>Product Groups</td>
<td>Programs of interest refer to the programs that a prospective student might be interested in such as art, biology, history, chemistry, and so on.</td>
</tr>
</tbody>
</table>
3 Setting Up Roles and Users

Setting Up Roles in Oracle Sales Cloud for Higher Education: Overview

Oracle Sales Cloud implements the Role-Based Access Control model, wherein users are assigned job roles and resource roles with access privileges to protected application resources and data. As these roles are not shipped along with Oracle Sales Cloud, you must create your own job roles and resource roles and add users to these roles.

⚠️ Note: You must import existing users and roles into the Oracle Fusion Applications Security before initializing role creation in the Security Console. For more information, see Securing Oracle Sales Cloud guide.

The following two roles must be set up for higher education:

- Higher Education Admissions Coordinator: Admissions coordinators assign inquiries and organizations to student recruiters based on defined territories and the enrollment goals set by the academic institution.
- Higher Education Student Recruiter: Student recruiters are representatives of an academic institution assigned to inquiries and organizations for recruiting purposes.

Roles and Users Creation Sequence

The following tasks provide an overview of the role creation sequence:

- Create higher education job roles.
- Create higher education resource roles.
- Create role provisioning rules.
- Create users and assign them to application roles.
- Enable Oracle Social Network access for the new roles.
- Configure security policies for the custom objects.

⚠️ Note: For more information about the different types of roles available in Oracle Sales Cloud, see Securing Oracle Sales Cloud guide.

Related Topics

- Role-Based Access Control: Explained
- Importing Users and Roles into Applications Security: Procedure
Creating Job Roles

This topic provides instructions to create job roles for higher education as job roles are not predefined in Oracle Sales Cloud. Job roles refer to the job functions which users must perform in an organization. Job roles provide users with access to the specific application function and data. Each job role inherits a corresponding application role of the same name and provides specific functional and data privileges to the related job role.

The following table lists the inheritable application roles and the corresponding new job roles.

<table>
<thead>
<tr>
<th>Application Role</th>
<th>Job Role Name</th>
<th>Role Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Manager</td>
<td>Higher Education Admissions Coordinator Custom</td>
<td>HIGHED_ ADMISSIONS_COORDINATOR_CUSTOM</td>
</tr>
<tr>
<td>Sales Representative</td>
<td>Higher Education Student Recruiter Custom</td>
<td>HIGHED_STUDENT_RECRUITER_CUSTOM</td>
</tr>
</tbody>
</table>

Perform the following steps to configure a job role:

1. Sign in as a Setup user and navigate to Security Console.
2. Go to the Administration subtab and click the Roles tab. The Role Preferences page appears.
3. On the Role Preferences page,
   a. Specify the values provided in the following table.

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copied Role Name Prefix</td>
<td>Higher Education</td>
</tr>
<tr>
<td>Copied Role Name Suffix</td>
<td>Custom</td>
</tr>
<tr>
<td>Copied Role Code Prefix</td>
<td>HIGHED_</td>
</tr>
<tr>
<td>Copied Role Code Suffix</td>
<td>_CUSTOM</td>
</tr>
</tbody>
</table>

   b. Select the Enable edit of data security policies and Enable edit of user role membership check boxes.
   c. Click Save.

   Note: The Enable default table view check box is checked by default.

4. Go to the Roles subtab and enter the required Application Role in the Search field.
5. Click the Search icon and on the Search Results page, select Copy Role from the Actions drop-down list.
6. On the Copy Options dialog box, select Copy top role and inherited roles and click Copy Role.
7. On the Copy Role: Basic Information page, enter the required Role Name and Role Code.
8. Enter the appropriate information in the Description field for the copied role.
9. Click the Summary and Impact Report train stop.
10. Click Submit and Close.
11. Click OK on the Confirmation dialog box.
12. On the Administration subtab, click the Role Copy Status tab.
13. On the Role Copy Status page, verify the Status of your copied role.

The status must be **Complete**.

### Creating Resource Roles

This topic provides instructions to create resource roles for higher education as resource roles are not predefined in Oracle Sales Cloud. Resource roles indicate the role a resource plays as an individual or within a resource team.

To create resource roles:

1. Sign in as a Setup user and navigate to Setup and Maintenance.
2. Enter **Manage Resource Roles** in the Search field and select the **Manage Resource Roles** task from the search results.
3. On the Manage Resource Roles page, in the Search Results region, go to **Actions > Create**
4. On the Create Role page,
   a. Enter the desired **Role Name** and **Role Code**, using the values provided in the following table:

<table>
<thead>
<tr>
<th>Role Name</th>
<th>Role Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Higher Education Admissions Coordinator</td>
<td>HigherEducationAdmissionsCoordinator</td>
</tr>
<tr>
<td>Higher Education Student Recruiter</td>
<td>HigherEducationStudentRecruiter</td>
</tr>
</tbody>
</table>

**Note:** The Resource Role Code has to be unique with no spaces.

b. Select **Sales** from the **Role Type** drop-down list.
c. Select the **Manager** check box for the **HigherEducationAdmissionsCoordinator** role code, as this resource role belongs to a manager. Select the **Member** check box for the **HigherEducationStudentRecruiter** role code, as this resource role belongs to an individual contributor.

5. Click **Save and Close**.

### Creating Role Provisioning Rules

This topic describes the role provisioning rules that you must create to map a resource role to the required job role. Roles are provisioned to users either through predefined role provisioning rules or through provisioning rules that you create.

Provisioning rules is also known as role mapping. For internal sales users, including sales administrators, you must map the resource role to the required job roles in the provisioning rule. The provisioning rules use the resource role that you assign to each sales user as a condition. Therefore, you must create a separate rule to provision each resource role. The following table lists the mapping of resource roles to job roles.
Oracle Sales Cloud
Getting Started with Higher Education Implementation

Chapter 3
Setting Up Roles and Users

<table>
<thead>
<tr>
<th>Resource Name</th>
<th>Mapping Name</th>
<th>Associated Resource Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admissions Coordinator</td>
<td>Higher Education Admissions Coordinator</td>
<td>Higher Education Admissions Coordinator</td>
</tr>
<tr>
<td>Student Recruiter</td>
<td>Higher Education Student Recruiter</td>
<td>Higher Education Student Recruiter</td>
</tr>
</tbody>
</table>

To create provisioning rules:

1. Sign in as a Setup user and navigate to Setup and Maintenance.
2. Enter **Manage HCM Role Provisioning Rules** in the Search field and select the **Manage HCM Role Provisioning Rules** task from the search results.
3. On the Manage Role Mappings page, in the Search Results region, go to Actions > Create.
4. On the Create Role Mappings page,
   a. Enter the **Mapping Name**.
   b. In the Conditions section, select the resource role to provision from the Resource Role drop-down list.
   c. Select **Active** from the HR Assignment Status drop-down list.
5. In the Associated Roles section, click **Add** to add the role name.
6. Click **Search** from the Role Name drop-down list.
7. On the Search and Select: Role Name dialog box, enter either the Role Name or the Common Role Name in the respective fields and click **Search**.
8. Select the required Resource Role Name and the Role Name from the search results and click **OK**.
9. Check the Autopropvision check box for the Role Name.
10. Click **Save and Close**.

Assigning Resource Roles to Users

This topic describes how to assign resource roles to users by using the appropriate provisioning rules with the required job role. Provisioning rules is required to provide users with access to specific application functions and data pertaining to those roles.

To assign a resource role:

1. Sign in as a Setup user and navigate to Manage Users.
2. Enter the name of the user in the Keywords field in the Search Person section. Select the user from the Search Results list.
   Alternatively, click the Create icon in the Search Results section, to add a new user.
3. Select the appropriate resource role from the Resource Role drop-down list in the Resource Information section.
4. Click **Autopropvision Roles**, to automatically provision roles to a user.
   Alternatively, click **Add Role**, to manually provision roles to a user.

> **Note:** Roles for which a user is automatically qualified appears in the Role Requests table with the status **Add Requested**.

5. Search and select the role on the Add Role dialog box. The role is added to the Role Requests table with the status **Add Requested**.
6. Click **Save and Close**.
Enabling Oracle Social Network for New Roles

Oracle Social Network is a secure, private social network that integrates with Oracle Sales Cloud and connects you to your colleagues. Oracle Sales Cloud for Higher Education supports all the existing functionalities of Oracle Social Network. To use Oracle Social Network, you must enable access for the newly created roles.

To enable Oracle Social Network access for roles:

1. Sign in as a Setup user and navigate to Security Console.
2. Go to the Roles subtab, enter Admissions Coordinator in the Search field and click the Search icon.
3. From the Search Results, select the Higher Education Admissions Coordinator Custom duty role.
4. From the selected role, select Edit Role from the Actions menu.
5. On the Edit Role: Basic Information page, click Next.
7. On the Add Function Security Policy dialog box, enter Launch Oracle Social Network in the Search field and click the Search icon.
8. Select Launch Oracle Social Network from the Search Results and click Add Privilege to Role.
9. Click OK on the confirmation dialog box.
10. Click Cancel to return to the Functional Security Policies page.
11. Click Next multiple times, until you go to the final Summary and Impact Report train stop.
12. Click Save and Close.

Note: To enable Oracle Social Network for Higher Education Student Recruiter Custom role, enter Student Recruiter in step 2, and repeat the steps in the preceding section.

Note: For more information on enabling objects for sharing on Oracle Social Network, see Oracle Sales Cloud Getting Started with Your Implementation guide.

Configuring Security Policy for Custom Objects

A security policy defines who can access a custom object data at run time. When a custom object is first created, access is granted only to a default duty role specified by the application. Any additional access, either at the object level or role level, must be granted manually. You can configure security policies such that users with Student Recruiter and Admissions Coordinator roles are granted access to the Previous Schools custom object.

To configure security policies:

1. Sign in as a Setup user.
2. Create and activate a sandbox.
3. Navigate to Application Composer.
4. Select Sales from the Application drop-down list.
5. Expand Standard Objects.
6. Expand Sales Lead.
7. Expand **Previous Schools** and click **Security**.
8. On the Define Policies page, select all the permissions for Higher Education Admissions Coordinator and Higher Education Student Recruiter roles.
9. Click **Save and Close**.
10. Publish the sandbox.

**Related Topics**

- Making Custom Object Pages Visible to Users: Explained
4 Configuring Page Layouts

Configuring Page Layouts

The default layouts delivered with Oracle Sales Cloud are automatically set to inactive and cannot be edited. You must duplicate the default layouts and then edit the new page layouts using application composer. This topic describes how you can duplicate the default layouts and configure them to suit the various user roles in higher education.

**Note:** You can dynamically control the display of page layouts based on:
- Role
- Groovy expression
- Type of record

For example, a specific layout created for a student recruiter role may enable only student recruiters to view specific fields on the inquiry records. The inquiry records are not visible to other user roles.

To enable higher education layouts, copy and update the objects provided in the following table.

<table>
<thead>
<tr>
<th>Application</th>
<th>Object Type</th>
<th>Object Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales</td>
<td>Standard</td>
<td>Sales Lead</td>
</tr>
<tr>
<td>Sales</td>
<td>Standard</td>
<td>Activity</td>
</tr>
<tr>
<td>Common</td>
<td>Standard</td>
<td>Contact</td>
</tr>
<tr>
<td>Common</td>
<td>Standard</td>
<td>Account</td>
</tr>
</tbody>
</table>

The following sections provide the steps to duplicate and activate page layouts for Sales Lead. You must repeat the same procedure for each object listed in the preceding table.

**Note:**
- You cannot inactivate the default layouts.
- You cannot delete page layouts, but can turn them inactive by deselecting the Active check box for a page layout on the Simplified Pages tab.
- You must create and activate the sandbox to perform these steps and then publish the sandbox to the mainline.
Accessing Higher Education Layouts

1. Sign in as a Setup user and navigate to Application Composer.
2. Select Sales from the Application drop-down list.
4. Expand Sales Lead and click Pages to access the page layouts for the selected object.

Duplicating Higher Education Layouts

You must perform the steps mentioned in the Accessing Higher Education Layouts section prior to proceeding with the following steps.

On the Simplified Pages tab, perform the following steps for the Landing Page Layouts, Creation Page Layouts, and the Details Page Layouts:

1. Select All layouts from the Layout Status drop-down list.
2. Select Higher Education layout name from the search results and select Duplicate Layout from the Actions drop-down list.
3. On the Duplicate Layout dialog box, enter the layout name in the New Layout Name field.
4. Click Save and Close.
5. Click the Role Name drop-down icon, corresponding to the duplicated page layout that you created.
6. On the Select: Roles dialog box, select the Specific role button.
7. Select Higher Education Student Recruiter Custom and Higher Education Admissions Coordinator Custom roles from the Available Roles list, and click OK.
8. Select the Active check box, to activate the duplicated layout.
5 Configuring Lookups

Configuring Standard Lookups

Higher education is shipped with several lookups that you can configure according to your business requirements. This topic covers the mandatory and optional configurations that you can perform on the available lookups.

Mandatory Configurations

The following is a list of lookup types which you must configure at the time of implementation:

- Inquiry Team Function
- Organization Size
- Program Type
- Institution
- Campus
- Admit Period
- Inquiry Source

Note: To configure each lookup type, perform the steps provided in the following example.

Configuring a Standard Lookup Type: Example

This example takes ZCA_RESOURCE_FUNCTION lookup type as a sample to describe the configuration of a standard lookup type.

1. Sign in as an Administrator and navigate to Setup and Maintenance.
2. Enter Manage Standard Lookups in the Search field and select the Manage Standard Lookups task from the search results.
3. Enter ZCARESOURCEFUNCTION in the Lookup Type field and click Search.
4. From the ZCARESOURCEFUNCTION: Lookup Codes section, click the New icon. Alternatively, select New from the Actions drop-down list.
5. Add your required lookup codes.
6. Disable the remaining lookup codes, either by clicking the Enabled check box against each lookup code or by setting the end date.
7. Click Save and Close.

Inquiry Team Function Lookup Type Configuration

In addition to a student recruiter, your inquiry team can have other members with resource functions such as Alumni Contact, Freshman Admissions Specialist, Student Contact, and so on. These resource functions must be added manually as lookup codes to the ZCARESOURCEFUNCTION lookup type. The following table lists some of these lookup codes which you can configure according to the requirements of your institution.
**Organization Size Lookup Type Configuration**

Organization Size renamed to Organization Type is one of the dimensions used for territory assignment to student recruiters. Therefore, you must configure this lookup type with the appropriate lookup code values. For example, organizations with the type of business would likely be assigned to a student recruiter specializing in continuing education.

The following table lists the lookup codes for the **HZ_ORGANIZATION_SIZE** lookup type.

<table>
<thead>
<tr>
<th>Lookup Code</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>BUSINESS</td>
<td>Business</td>
</tr>
<tr>
<td>FOUNDATION</td>
<td>Foundation</td>
</tr>
<tr>
<td>GOV_AGENCY</td>
<td>Government Agency</td>
</tr>
<tr>
<td>NONProfit</td>
<td>Nonprofit</td>
</tr>
<tr>
<td>OTHER</td>
<td>Other</td>
</tr>
<tr>
<td>SCHOOL</td>
<td>School</td>
</tr>
</tbody>
</table>

**Program Type, Institution, Campus, Admit Period, and Inquiry Source**

To use the lookup types suitable for your institution, see the values provided in the following table.

<table>
<thead>
<tr>
<th>Lookup Type Name</th>
<th>Lookup Type Code</th>
<th>Lookup Type Description</th>
<th>Examples of Lookup Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Program Type</td>
<td>ORA_AHE_PROGRAM_TYPE</td>
<td>The academic level or program that the student chooses to enroll to achieve their academic goal.</td>
<td>Undergraduate, Graduate, Law School, Medical School, Certificate, Continuing Education</td>
</tr>
</tbody>
</table>
### Optional Configurations

The following table lists the lookup types for which configuration is optional. To configure the lookup types according to your requirements, use the values provided in this table.

<table>
<thead>
<tr>
<th>Lookup Type Name</th>
<th>Lookup Type Code</th>
<th>Lookup Type Description</th>
<th>Examples of Lookup Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Citizenship Status</td>
<td>ORA_AHE_CITIZENSHIP_STATUS</td>
<td>The status of citizenship of a person, such as Native, Naturalized, Permanent Resident, or Employment Visa.</td>
<td>Alien permanent, Alien temporary, Native, Naturalized, Not Indicated, Other</td>
</tr>
<tr>
<td>Military Status</td>
<td>ORA_AHE_MILITARY_STATUS</td>
<td>The status of the involvement of a person in the military.</td>
<td>Active reserve, No Military service, Not a veteran, Not indicated, Retired military, Not a veteran, Armed forces service medal vet</td>
</tr>
<tr>
<td>Race</td>
<td>ORA_AHE_RACE</td>
<td>A means through which the constituents identify themselves such as a particular ethnic affiliation or group.</td>
<td>American Indian or Alaska Native, Asian, Black or African American, White, Hispanic or Latino, More than one race, Unknown or not reported</td>
</tr>
<tr>
<td>Hispanic or Latino</td>
<td>ORA_AHE_HISPANIC_LATINO</td>
<td>A means through which the constituents identify themselves with a Hispanic or Latino ethnic group.</td>
<td>Hispanic or Latino, Not Hispanic or Latino</td>
</tr>
</tbody>
</table>
### Configuring Lookups

<table>
<thead>
<tr>
<th>Lookup Type Name</th>
<th>Lookup Type Code</th>
<th>Lookup Type Description</th>
<th>Examples of Lookup Codes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admit Level</td>
<td>ORA_AHE_ADMIT_LEVEL</td>
<td>The academic level of the student upon admission.</td>
<td>First year, Transfer, Second degree seeking</td>
</tr>
<tr>
<td>Current Year</td>
<td>ORA_AHE_CURRENT_YEAR</td>
<td>The current academic year of the student such as high school senior, college freshman or postgraduate student.</td>
<td>HGRD Freshman, UGRD Junior, HS Senior, HS Junior</td>
</tr>
<tr>
<td>Residency Status</td>
<td>ORA_AHE_RESIDENCY_STATUS</td>
<td>The legal domicile status of the student in relation to the state or country.</td>
<td>In state, Out of state, Military</td>
</tr>
<tr>
<td>Highest Education Level</td>
<td>ORA_AHE_HIGHEST_ED_LEVEL</td>
<td>A demographic parameter indicating the highest level of education attained by the student.</td>
<td>GED, High school graduates, Associates degree, Professional degree</td>
</tr>
<tr>
<td>Housing Preference</td>
<td>ORA_AHE_HOUSING_PREF</td>
<td>The preferred housing option specified by the student such as on campus or commuter.</td>
<td>Computer, Off campus, On campus</td>
</tr>
<tr>
<td>Degree</td>
<td>ORA_AHE_DEGREE</td>
<td>The title conferred on students by a college, university, or professional school on completion of a program of study.</td>
<td>Associates of Arts, Bachelor of Arts, Bachelor of Science, High school diploma, Masters of Fine Arts</td>
</tr>
<tr>
<td>Proprietorship</td>
<td>ORA_AHE_PROPRIETORSHIP</td>
<td>The type of ownership of an organization such as private, public or parochial.</td>
<td>Parochial, Private, Public, Other</td>
</tr>
<tr>
<td>Gender</td>
<td>HZ_GENDER</td>
<td>Gender of a constituent</td>
<td>Male, Female</td>
</tr>
<tr>
<td>School Type</td>
<td>ORA_AHE_SCHOOL_TYPE</td>
<td>Type of an academic institution such as secondary school, university or state college.</td>
<td>University, State college, Vocational school, Secondary school, Home school, Charter school</td>
</tr>
</tbody>
</table>

**Note:** You can also modify the lookup type description and add or remove lookup values associated with the lookup type codes.
Configuring Organization and Constituent Relationships
Lookups in Oracle Sales Cloud for Higher Education:
Explained

This topic describes how you can rename lookup code meanings for relationship types for organizations and constituents.

Accounts and contacts are renamed as organizations and constituents in Oracle Sales Cloud for Higher Education. The existing lookups for relationship types and records with lookup code values such as account or contact must therefore be renamed to organization or constituent, respectively.

Renaming Lookup Code Meanings for Relationship Types

The following table provides the information required to rename the lookup codes and their meanings.

<table>
<thead>
<tr>
<th>Lookup Type</th>
<th>Lookup Code</th>
<th>Existing Lookup Code Meaning</th>
<th>New Lookup Code Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZCA_RECORD_TYPE</td>
<td>PERSON</td>
<td>Contact</td>
<td>Constituent</td>
</tr>
<tr>
<td>ZCA_RECORD_TYPE</td>
<td>ORGANIZATION</td>
<td>Account</td>
<td>Organization</td>
</tr>
<tr>
<td>ZCA_CONTACT TYPE</td>
<td>ZCA_CONTACT</td>
<td>Contact</td>
<td>Constituent</td>
</tr>
</tbody>
</table>

To modify the meaning of an existing lookup type:

1. Sign in as an Administrator and navigate to Setup and Maintenance.
2. Enter Manage Customer Center Lookups in the Search field and select the Manage Customer Center Lookups task from the search results.
3. Click the required lookup type value listed in the preceding table.
4. In the Lookup Codes section, select the required Lookup Code row and enter the new lookup code meaning in the Meaning column.
5. Click Save and Close.
6 Configuring Addresses

Configuring Profile Values

Student recruiters in higher education must be able to create new organization records without having to enter an address. To do this, you must change the default profile values for address requirement.

To change the default profile values for address requirement:

1. Sign in as a Setup user and navigate to Setup and Maintenance.
2. Enter Manage Administrator Profile Values in the Search field and select the Manage Administrator Profile Values task from the search results.
3. Enter ZCA_ACCOUNT_ADDRESS_REQUIRED_ENABLED in the Profile Option Code field, in the Search: Profile Option section.
4. Click Search.
5. In the ZCA_ACCOUNT_ADDRESS_REQUIRED_ENABLED: Profile Values section, for Profile Level as Site, select No from the Profile Value drop-down list.
6. Click Save and Close.

Configuring Address Style Formats

An address style format specifies the layout of an address. You must add additional address lines and specify whether it is a city or town to meets the requirements of higher education. This topic describes how you can configure an address style format.

To configure the default address style format:

1. Sign in as a Setup user and navigate to Setup and Maintenance.
2. Enter Define Address Configuration in the Search field and select the Define Address Configuration task from the search results.
3. On the Task List: Define Address Configuration page, select Manage Address Formats from the Task list.
4. On the Manage Address Formats page, Search section, select United States from the Country drop-down list and click Search.
5. Click United States Postal Address Format from the Search Results.
7. On the Format Layout tab, go to Actions > Add.
8. Add two new rows and enter the values given in the following table.

<table>
<thead>
<tr>
<th>Line</th>
<th>Position</th>
<th>Prompt</th>
<th>Address Element</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>1</td>
<td>Address Line 3</td>
<td>Address Line 3</td>
</tr>
<tr>
<td>4</td>
<td>1</td>
<td>Address Line 4</td>
<td>Address Line 4</td>
</tr>
</tbody>
</table>

9. Update the prompt City to City or Town.
10. Click Save and Close.
Note: Update the Line, Position, Required and Format values as required.

Related Topics

• Creating an Address Style Format: Worked Example

Enabling Multiple Addresses

This topic describes how you can enable multiple addresses on organization and constituent profiles to help student recruiters effectively manage outreach activities at different locations.

To enable multiple addresses for organizations and constituents, use the values provided in the following table and perform the following steps.

<table>
<thead>
<tr>
<th>Object Name</th>
<th>Standard Object Name</th>
<th>Page Layout Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Organization</td>
<td>Account</td>
<td>Detail</td>
</tr>
<tr>
<td>Constituent</td>
<td>Contact</td>
<td>Edit Contact</td>
</tr>
</tbody>
</table>

1. Sign in as a Setup user.
2. Create and activate a sandbox and navigate to Application Composer.
3. Select Common from the Application drop-down list.
4. Expand Standard Objects.
5. Expand the required standard object name and click Pages.
6. Create a duplicate layout for the required page layout, if not already created, and activate it.
7. Click the duplicate page layout.
8. On the Layout: Duplicate page, click the Profile subtab in the Subtabs Region.
9. Click the Show link for Multiple Addresses, and click Done.
10. Use Navigator to open the object that you are modifying, such as Organization or Constituent.
11. Click your user name in the global header and from Administration, select Customize Pages.
12. Select the Site layer to open the search page in Page Composer, and click OK.
13. Click any existing record and click the Profile tab.
14. Click Select on the Page Composer section.
15. Click the Single Address region on the Profile page.
16. Click Edit Parent Single Address Region.
17. Deselect the Show Component check box and click OK.
18. Click Close on the page composer area.
19. Publish the sandbox, once you have completed the changes for both organizations and constituents.

Related Topics

• Configuring Page Layouts in Oracle Sales Cloud for Higher Education: Worked Example
• Enabling Display of Multiple Addresses: Explained
Hiding Inquiry Contact Address

This topic describes how to disable contact addresses on the inquiry page as addresses must be maintained using constituent and organization records.

✏️ Note: The creation page layout for Sales Lead Standard Object must be duplicated.

To hide inquiry contact address:

1. Sign in as a Setup user.
2. Create and activate a sandbox.
3. Navigate to Inquiries.
4. Click your user name in the global header and from Administration, select Customize Pages.
5. Select the Site layer to open the search page in Page Composer, and click OK.
6. Click Create Inquiry.
7. Enter a name for an inquiry.
8. Click Select on the Page Composer area.
9. Click the Contact Address region on Create Inquiry page.
10. Click Edit Component.
11. Deselect Show Component and click OK.
12. Click Add Content on Page Composer area.
13. Click Cancel to close the Create Inquiry page.
14. On the Inquiries page, click an existing inquiry and navigate to the Summary tab.
15. Repeat steps 8 to 12.
16. Click Save on the Summary subtab.
17. Click Close on the Page Composer area.
18. Publish the sandbox.

Related Topics

- Configuring Page Layouts in Oracle Sales Cloud for Higher Education: Worked Example
7 Importing Organizations, Constituents, and Inquiries

File Based Data Import: Overview

You can perform file-based data import to import records, in the following order:

1. Organizations
2. Organization Constituents
3. Inquiry Constituents
4. Inquiries

Steps to Import

The following steps provide an overview of the data import procedure. You must refer to the specific topics for each of these steps to implement each step.

1. Generate import or export artifacts.
2. Copy, modify, and download the import templates as CSV files.
3. Populate the import templates with data.
4. Import CSV files with your data to the application.

Related Topics

• File Import: How It Works

Generating Import or Export Artifacts

To support the import and export of custom objects, you must generate the artifacts required for these processes. The creation of import and export artifacts occurs only in the Oracle Metadata Services Repository mainline and is not supported within the sandbox. Therefore, you must ensure to be outside the sandbox. To enable the import and export of the custom object data:

1. Sign in as an Administrator and navigate to Application Composer.
2. Click Import and Export.
3. Select Common from the Application drop-down list.
4. On the Generate Import and Export Artifacts page, click Generate.
   Upon successful artifacts generation, a confirmation message is displayed stating that the artifacts were created for all custom objects.
5. Select Sales from the Application drop-down list for step 3, and repeat step 4.

Related Topics

• Importing and Exporting Custom Objects: Explained
Configuring and Downloading File Import Templates

You can predefine a mapping between the columns provided in a source file and the attributes pertaining to the objects being imported. A mapping can be reused in the Import Activity definition which is used to import your data.

Copying Import Mappings

You must copy import mappings for accounts, contacts, and leads, to configure them with the new attributes added for organizations, constituents, and inquiries, respectively.

To copy and configure the required file import mappings:

1. Sign in as an Administrator and navigate to Setup and Maintenance.
2. Enter Manage File Import Mappings in the Search field and select the Manage File Import Mappings task from the search results.
3. To copy the import mapping, repeat the following steps for all the objects listed in the following table.

<table>
<thead>
<tr>
<th>Object</th>
<th>Mapping Name</th>
<th>New Mapping Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account</td>
<td>Account Create and Update Predefined Mapping</td>
<td>Higher education organization</td>
</tr>
<tr>
<td>Contact</td>
<td>Contact Create and Update Predefined Mapping</td>
<td>Higher education constituent</td>
</tr>
<tr>
<td>Lead</td>
<td>Lead Predefined Mapping - Import Leads</td>
<td>Higher education inquiry</td>
</tr>
</tbody>
</table>

   a. In the Search section, select the required Object and click Search.
   b. Select and highlight the mapping name from the results list as per the values provided in the preceding table.
   c. Click Actions > Copy Mapping.

   A new mapping row is added to the results list with the suffix Copy of in the mapping name.
   d. Click this copied mapping name link from the list to open the mapping.
   e. On the Edit Import Mappings page, update Import Mapping to give a new mapping name as per the preceding table.
   f. Click Save.

Configuring and Downloading Import Mappings

After you copy the import mappings, you must edit them and add new columns for the additional fields for organizations, constituents, and inquiries.

To configure the import mapping Higher Education Organization, use the values provided in the following table.

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Object</th>
<th>Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACT</td>
<td>OrganizationProfileExtn</td>
<td>__ORAHE__ACT_c</td>
</tr>
</tbody>
</table>
To configure the import mapping **Higher Education Constituent**, use the values provided in the following table.

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Object</th>
<th>Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefix</td>
<td>PersonProfile</td>
<td>PersonPreNameAdjunct</td>
</tr>
<tr>
<td>Suffix</td>
<td>PersonProfile</td>
<td>PersonNameSuffix</td>
</tr>
<tr>
<td>Affinity</td>
<td>PersonProfile</td>
<td>SalesAffinityCode</td>
</tr>
<tr>
<td>Preferred_Name</td>
<td>PersonProfileExtn</td>
<td>__ORAHE__PreferredName_c</td>
</tr>
<tr>
<td>Country_ Of_ Citizenship</td>
<td>PersonProfileExtn</td>
<td>__ORAHE__CountryOfCitizenship_Id_c</td>
</tr>
<tr>
<td>Citizenship_ Status</td>
<td>PersonProfileExtn</td>
<td>__ORAHE__CitizenshipStatus_c</td>
</tr>
<tr>
<td>Military_ Status</td>
<td>PersonProfileExtn</td>
<td>__ORAHE__MilitaryStatus_c</td>
</tr>
<tr>
<td>Preferred_ Language</td>
<td>PersonProfileExtn</td>
<td>__ORAHE__PreferredLanguage_Id_c</td>
</tr>
<tr>
<td>Hispanic_ Or_Latino</td>
<td>PersonProfileExtn</td>
<td>__ORAHE__HispanicOrLatino_c</td>
</tr>
<tr>
<td>Race</td>
<td>PersonProfileExtn</td>
<td>__ORAHE__Race_c</td>
</tr>
<tr>
<td>TwitterId</td>
<td>PersonProfileExtn</td>
<td>__ORAHE__TwitterID_c</td>
</tr>
</tbody>
</table>
To configure the import mapping **Higher Education Inquiry**, use the values provided in the following table.

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Object</th>
<th>Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary_ Contact_Id</td>
<td>Lead</td>
<td>PrimaryContactId</td>
</tr>
<tr>
<td>Owner_Id</td>
<td>Lead</td>
<td>OwnerId</td>
</tr>
<tr>
<td>Customer_Id</td>
<td>Lead</td>
<td>CustomerId</td>
</tr>
<tr>
<td>Admit Level</td>
<td>Lead</td>
<td>__ORAHE__AdmitLevel_c</td>
</tr>
<tr>
<td>Admit Period</td>
<td>Lead</td>
<td>__ORAHE__AdmitPeriod_c</td>
</tr>
<tr>
<td>Campus</td>
<td>Lead</td>
<td>__ORAHE__Campus_c</td>
</tr>
<tr>
<td>Class Rank Percentile</td>
<td>Lead</td>
<td>__ORAHE__ClassRankPercentile_c</td>
</tr>
<tr>
<td>Current GPA</td>
<td>Lead</td>
<td>__ORAHE__CurrentGPA_c</td>
</tr>
<tr>
<td>Current Year</td>
<td>Lead</td>
<td>__ORAHE__CurrentYear_c</td>
</tr>
<tr>
<td>Enrolled in AP Courses</td>
<td>Lead</td>
<td>__ORAHE__EnrolledInAPCourses_c</td>
</tr>
<tr>
<td>Financial Aid Interest</td>
<td>Lead</td>
<td>__ORAHE__FinancialAidInterest_c</td>
</tr>
<tr>
<td>First Generation College Student</td>
<td>Lead</td>
<td>__ORAHE__FirstGenerationCollegeStudent_c</td>
</tr>
<tr>
<td>Highest Education Level</td>
<td>Lead</td>
<td>__ORAHE__HighestEducationLevel_c</td>
</tr>
<tr>
<td>Housing Preference</td>
<td>Lead</td>
<td>__ORAHE__HousingPreference_c</td>
</tr>
<tr>
<td>Inquiry Source</td>
<td>Lead</td>
<td>__ORAHE__InquirySource_c</td>
</tr>
<tr>
<td>Institution</td>
<td>Lead</td>
<td>__ORAHE__Institution_c</td>
</tr>
<tr>
<td>International Student</td>
<td>Lead</td>
<td>__ORAHE__InternationalStudent_c</td>
</tr>
<tr>
<td>Academic Level</td>
<td>Lead</td>
<td>__ORAHE__AcademicLevel_c</td>
</tr>
<tr>
<td>Residency Status</td>
<td>Lead</td>
<td>__ORAHE__ResidencyStatus_c</td>
</tr>
<tr>
<td>Scholarship Interest</td>
<td>Lead</td>
<td>__ORAHE__ScholarshipInterest_c</td>
</tr>
<tr>
<td>ProductGroupName</td>
<td>LeadProduct</td>
<td>ProductGroupName</td>
</tr>
</tbody>
</table>
To configure and download all the newly copied file import mapping templates, use the values provided in the preceding tables and then perform the following steps:

1. Open the import mapping page and select the last row of the Column Mapping section.
2. Note the Sequence number.
3. Click Create for each additional attribute of the object.

A new row is created.
4. Enter the Sequence number. The number must be greater than the last row in the template.
5. Using the preceding tables to specify the Column Header, Object, and Attribute for the import template that you are configuring.
6. Click Save.
7. Click Download Template, and save your new template by providing the appropriate local file path.

The import template is stored in your local drive as a .csv file.
8. Click Save and Close.

Related Topics
- File-Based Import Mapping: Explained

Populating Import Templates with Data in Oracle Sales Cloud for Higher Education

After you configure and download csv files for import templates related to organizations, constituents, and inquiries, you must populate these files with your data to import them to the application.

Alternatively, an SQL based extract can be developed to extract organization data from your on-premise Student Information System and this data can be saved in the required csv format in import preparation.

✍ Note: You must populate additional attributes configured in the individual mapping templates along with the predefined attributes for accounts, contacts, and leads. For information about the newly configured attributes, see Configuring and Downloading File Import Templates.

- For more information about file-based data import, see the File Based Data Import for Oracle Sales Cloud guide.
- For more information about individual attributes, see the following guides:
  - Understanding File-Based Data Import and Export
  - Oracle Sales Cloud Getting Started with Your Implementation
Populating Organization Data

Populate organizations import template file with values for newly created attributes and sales cloud accounts attributes. Ensure that the `Account_Owner_Party_Id` column fields in the import template file are correctly formatted as a `NUMBER` type field with 0 decimal places to avoid any import errors.

For more information about predefined account attributes, see the Understanding the Account Import Template topic in the Oracle Sales Cloud Getting Started with Your Implementation guide.

Populating Inquiry Data

Populate inquiries import template file with values for newly created attributes and sales cloud leads attributes. Ensure that the Lead Name attribute must be of the format `<FirstName> <LastName> <m/d/yy> <H:MM> <AM|PM>`. You must also populate values for Existing Constituent (based on `Primary_Contact_Id`) and Organization (based on `Customer_Id`). Additionally, also populate the Prospect Program Interest Key by modifying the delivered groovy based on your business practices and prospective student data. The groovy formula must be similar to the one used in Oracle Eloqua to populate the Prospect Program Interest Key.

For more information about importing leads, see Importing Leads Using File-Based Import in the Oracle Sales Cloud Using Sales guide.

Populating Constituent Data

Populate constituents import template file with values for newly created attributes and sales cloud contacts attributes.

- If you are populating data for Inquiry Constituents, you must populate the additional attributes that are newly added for constituents. Do not populate organization name for these records.
- If you are populating data for Organization Constituents, you must specify organization name for these records. Do not populate the newly added attributes for constituents.

For more information about the predefined contact attributes, see the Understanding the Contact Import Template topic in the Oracle Sales Cloud Getting Started with Your Implementation guide.

Related Topics

- Understanding the Account Import Template
- Importing Leads Using File Import: Explained
- Understanding the Contact Import Template
- File Import: How It Works

Importing Data from Files

To import your data from a file, you must create an import activity and map the attributes in your file to the attributes in the application. To view the activity processing details, select the activity schedule status.

To import data from a file, repeat the following procedure for organizations, constituents, and inquiries:

1. Sign in as an Administrator and navigate to Setup and Maintenance.
2. Enter **Manage File Import Activities** in the Search field and select the **Manage File Import Activities** task from the search results.

3. Click **Create** from the Actions drop-down list.

4. On the **Enter Import Options** train stop, specify the details using the information provided in the following table.

<table>
<thead>
<tr>
<th>Name</th>
<th>Object</th>
<th>Import Mapping</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inquiry Load</td>
<td>Lead</td>
<td>Higher education inquiry</td>
</tr>
<tr>
<td>Organization Load</td>
<td>Account</td>
<td>Higher education organization</td>
</tr>
<tr>
<td>Constituent Load</td>
<td>Contact</td>
<td>Higher education constituent</td>
</tr>
</tbody>
</table>

a. In the Summary section, enter the name of your import in the **Name** field.

b. Select the **Object**.

c. In the Source File section, select **Desktop** from the **Upload From** option.

d. Click **Browse** to select the data file on your local drive.

   If your data file includes a header row, then select the **Header Row Included** option. Although you can upload files without header rows, doing so makes it more difficult to complete the mapping between the data in your file and the application. If the values in the csv file contain new line character, they must be enclosed within quotation marks.

e. Select the required **Import Mapping**.

f. Click **Next**, until you reach the **Review and Activate** train stop.

5. Click **Activate** on **Review and Activate** train stop.

   You must return to the Manage Import Activities page to view the status of your import. An import activity with a status of Completed or Completed with Errors indicates that the import activity is complete.

6. Click the status link to see data on successful import, including logs and error files that are linked in the Files Processed section.

**Related Topics**

- File Import Activity Statuses: Explained
- Importing Data from a File: Procedure
- Troubleshooting Common Import Errors
8 Assigning Inquiries Using Rule-based Assignment

Assigning Inquiries Using Rule-based Assignment: Simple Example

You can enable additional custom attributes to assign inquiries using rule-based assignment, which are otherwise not available as dimensions through territory-based assignment. The following section describes how you can use rule-based assignment to create assignment rules using a custom attribute.

To assign using a custom attribute, you must perform the steps in the following sequence:

- Enable a custom attribute
- Build a rule based on the custom attribute
- Adjust profile options on the lead object
- Enable batch processing
- Set up a batch assignment process

Enable a Custom Attribute

You must enable a custom attribute before you can build a rule that uses it to assign prospective student inquiries to a student recruiter. The following section takes the example of enabling the Academic Level custom attribute to the Sales Lead object.

1. Sign in as a Setup user and navigate to Setup and Maintenance.
2. Enter Manage Sales Lead Assignment Objects in the Search field and select the Manage Sales Lead Assignment Objects task from the search results.
3. Select the Sales Lead row on the Manage Sales Lead Assignment Objects page.
4. In the Sales Lead: Details region, go to the Attributes tab and click Actions-Add Row.
5. Select Academic Level from the View Object Attribute drop-down list. You can add additional attributes for which rules are to be added.

> **Note:** You need not fill the Diagnostic Display Attribute and the Candidate Information Sequence fields. Ensure that the Inactive check box is not selected.

6. Go to the Candidates tab in the Sales Lead: Details region and select the Sales Lead Resource row, if it is not selected by default.
7. In the Sales Lead Resource: Rule Categories region, ensure that the Inactive check box for the Sales Lead Resource Rule Category row, is not selected.
8. Click Save and Publish. A Processing pop-up message appears.
You can now build a rule based on the custom attribute that you have enabled and assign it to the respective resource. You must create an assignment rule set with a description that helps users understand the purpose of the rule set. You can start with a single rule set and assess the need to create multiple rule sets depending on your institutional requirements.

The following section takes the example of the Lead Assignment Rules rule set. Once this rule set is created, you can add a list of rules and assign them to student recruiters accordingly.

Build a Rule Based on the Custom Attribute

1. Sign in as a Setup user and navigate to Setup and Maintenance.
2. Enter Manage Sales Lead Assignment Rules in the Search field and select the Manage Sales Lead Assignment Rules task from the search results.
3. From the Manage Sales Lead Assignment Rules page, in the Rule Sets region, select Sales Lead Resource Rule Category from the Category drop-down list.
4. Go to Actions-Add Row.
5. Enter the name of the rule set as Lead Assignment Rules.
6. In the Lead Assignment Rules: Rules region, go to Actions-Create.
7. On the Create Rule Page, enter the Rule Name as Undergraduate Students with High GPA.
8. In the Conditions region, go to Actions-Add Row.
9. In the new row, select the following:
   - Select Sales Lead from the Object drop-down list.
   - Select Academic Level from the Attribute drop-down list.
   - Select Equals from the Operator drop-down list.
   - Select Undergraduate from the Value drop-down list.
10. Go to Actions-Add Row.
11. In the new row, select the following:
    - Select Sales Lead from the Object drop-down list.
    - Select Current GPA from the Attribute drop-down list.
    - Select Greater than or Equals from the Operator drop-down list.
    - Select 3.5 from the Value drop-down list.
12. Go to Actions-Select and Add. The Select and Add: Sales Lead Resource dialog box appears.
13. Search for the appropriate resource name and select it from the Search Results region.
14. Click Apply and then click OK.
15. Click Save and Close.
16. Repeat steps 4 to 6.
17. On the Create Rule page, enter the rule name as Graduate Students with High GPA.
18. In the Conditions region, go to Actions > Add Row.
19. In the new row, select the following:
    - Select Sales Lead from the Object drop-down list.
    - Select Academic Level from the Attribute drop-down list.
    - Select Equals from the Operator drop-down list.
Assigning Inquiries Using Rule-based Assignment

20. Go to Actions-Create.
21. In the new row, select the following:
   - Select Graduation from the Value drop-down list.
   - Select Sales Lead from the Object drop-down list.
   - Select Current GPA from the Attribute drop-down list.
   - Select Greater than or Equals from the Operator drop-down list.
   - Select 3.5 from the Value drop-down list.
23. Search for the appropriate resource name and select it from the Search Results region.
24. Click Apply and then click OK.
25. Click Save and Close.

You must set the default assignment mode for leads to rule-based assignment. To do this, you must adjust the profile options on the lead object.

Adjust Profile Options on the Lead Object

The following example sets the default assignment type to rule-based assignment only for a sales lead resource.

**Note:** While you can use both rule-based assignment and territory-based assignment, it is advisable to use only one type of assignment at a time for a given object. For example, you can use territory-based assignments for organizations and rule-based assignments for leads. You must specify the assignment type by modifying the profile options for an object.

1. Sign in as a Setup user and navigate to Setup and Maintenance.
2. Enter Manage Sales Lead Profile Options in the Search field and select the Manage Sales Lead Profile Options task from the search results.
3. On the Manage Sales Lead Profile Options page, in the Search: Profile Option region, enter MKL_LEAD_DEFAULT_ASGN_MODE in the Profile Option Code field.
4. Click Search.
5. In the Search Results: Profile Option region, select MKL_LEAD_DEFAULT_ASGN_MODE from the Profile Option Code column.
6. From the MKL_LEAD_DEFAULT_ASGN_MODE: Profile Values region, select Rule-based Assignment Only for the Site level profile value from the Profile Value drop-down list.
7. Click Save.
8. From the Manage Sales Lead Profile Options page, in the Search: Profile Option region, enter MKL_LEAD_ASSIGNMENT_MATCHING_RULE in the Profile Option Code field.
9. Click Search.
10. In the Search Results: Profile Option region, select MKL_LEAD_ASSIGNMENT_MATCHING_RULE from the Profile Option Code column.
11. From the MKL_LEAD_ASSIGNMENT_MATCHING_RULE: Profile Values region, select Sales Lead Resource Rule Category for the Site level profile value from the Profile Value drop-down list.
12. Click Save and Close.
Enable Batch Processing

You can now set up batch assignments to process multiple records at the same time. To set up batch assignments, you must first enable batch processing.

1. Sign in as a Setup user and navigate to Setup and Maintenance.
2. Enter Manage Sales Lead Profile Options in the Search field and select the Manage Sales Lead Profile Options task from the search results.
3. On the Manage Sales Lead Profile Options page, in the Search: Profile Option region, enter Sales Leads in the Profile Option Code field.
4. Click Search.
5. In the Search Results: Profile Option region, scroll through the search results and select MKL_LEAD_BATCH_ASSIGNMENT from the Profile Option Code column.
6. From the MKL_LEAD_BATCH_ASSIGNMENT: Profile Values region, select Yes from the Profile Value drop-down list for the Site profile level.
7. Click Save and Close.

The following section is an example of a batch assignment process set up to assign all prospective student inquiries created within a specific date window or on the last day, regardless of their current assignment status.

Set up a Batch Assignment Process

To set up a batch assignment process:

1. Sign in as an administrator and navigate to Setup and Maintenance.
2. Enter Manage Lead Processing Activities in the Search field and select the Manage Lead Processing Activities task from the search results.
3. On the Lead Processing Activities page, click Create Lead Processing Activity.
4. On the Create Lead Processing Activity dialog box, in the Activity Details region, select Assignment from the Process Type drop-down list.
5. On the Create Lead Processing Activity dialog box, in the Lead Selection region, do the following:
   - Select the Age in Days radio button, and enter the number one.
   - Select Yes from the Reassign drop-down list.
   - Leave all other fields blank.
6. From the Schedule region, select Immediate from the Schedule Mode drop-down list.
7. Click Submit. A confirmation message appears.

You can now login as a student recruiter and verify that the lead records are assigned according to the rule set.

>Note: You can set up multiple batch assignments at the same time to process different categories of leads based on their data.
Monitor, Cancel or Hold Batch Assignment Processes

You can monitor your batch assignment processes and either cancel or put them on hold. To do so, you must navigate to Scheduled Processes from the Navigator and select your specific task from the list of ongoing tasks. You cannot edit an existing batch assignment process. Instead, you must cancel the existing batch assignment process and then return to the Manage Lead Process Activities task in Setup and Maintenance to create the required batch assignment version.

For more information about setting up work assignments, see the oracle Sales Cloud Implementing Sales guide.

Related Topics

- Work Assignment: Overview
- Configuring Assignment: Critical Choices
- Mapping Set Components: How They Work Together
- Assignment Rule Components: How They Work Together
9 Configuring Programs of Interest

Configuring Programs of Interest Using Root Product Groups

Higher education uses product groups as Programs of Interest. This topic describes how you must first create a root product group to create and configure higher education programs of interest.

Creating a Root Product group

To create the root product group:

1. Sign in as a Setup user and navigate to Setup and Maintenance.
2. Enter Manage Product Groups in the Search field and select the Manage Product Groups task from the search results.
3. Go to Actions > Create on the Manage Product Groups panel.
4. Enter an internal name without spaces in the Name field. For example, HigherEducation. This name is not displayed in the catalog.
5. Enter a name that you want displayed in the catalog in the Display field. For example, Higher Education.
6. Select the Active check box.
7. Deselect the Allow Duplicate Children check box, as Oracle Sales Cloud does not permit the same product groups to appear multiple times in the sales class hierarchy.
8. Select the Root Catalog check box for the root product group.
9. Click Save and Close.

Configuring Programs of Interest

You must add product groups to your sales catalog to configure programs of interest.

To add product groups:

1. Sign in as a Setup user and navigate to Setup and Maintenance.
2. Enter Manage Product Groups in the Search field and select the Manage Product Groups task from the search results.
3. Select the level of hierarchy that you want to create for the new program. For example, to create Undergraduate within Higher Education, select the Higher Education group. Or, if you want to create UGRD-Architecture within Undergraduate, select the Undergraduate group.
4. Click Lock, if not already locked.
5. On the Subgroups tab, click Create.
6. On the Create Subgroup page,
   a. Enter a Name without spaces. For example, UGRD-Architecture.
   b. Enter a Display name.
   c. Select the Active option.
   d. Click Save.
7. Repeat steps 3 to 6 until you have the complete setup of the programs of interest.
8. Once you have completed the setup, select the root product group. For example, Higher Education.
9. Click Lock, if not already locked.
10. Click Publish.
11. Click Yes, to confirm publishing and click OK on confirmation.
12. Click Save and Close.

Note: To make your programs of interest appear on the Inquiry Profile page, refer to the steps in the Making a Sales Catalog Available for Use section in the Getting Started with Your Implementation guide.
10 Configuring Saved Searches and Choice List Filters

Configuring Saved Searches

This topic describes how you can create and save a specific search criteria for reuse. Saved searches not only fasten your future searches but also make the newly created searches available to other users as well. Admissions coordinators can use such saved searches to view specific information depending on the search criteria defined in the saved search.

This example shows how to create an inquiry saved search using Admit Period.

Create Inquiry Saved Search using Admit Period

1. Sign in as a Setup user.
2. Create and activate a Sandbox.
3. Navigate to Inquiries.
4. Click your user name in the global header and from Administration, select Customize Pages.
5. Select the Site layer to open the search page in customization mode and click OK. The Page Composer customization is displayed.
6. On the Inquiries page, select Create or Edit Lists from the List drop-down list. The Advanced Search panel is displayed.
7. Select My Open Inquiries from the Saved Search list.
8. In the Record Set region, select Equals and All records I can see.
9. In the panel, click Add and select Admit Period.
10. In the Admit Period region, select Equals. You can optionally select the value as well.
11. Click Save.
12. On the Create Saved Search dialog box, enter an appropriate name in the Name field, and click OK. The Set as Default and Run Automatically check boxes are selected by default.
13. Click Close on the Page Composer area.
14. Publish the Sandbox.

Related Topics
- Making Saved Searches Available to All Users: Procedure
Configuring Choice List Filters

You must set up choice list filters for Inquiries and choose select fields related to inquiries.

Setting up Inquiry Admit Level Filter Based on Academic Level

Admit level values may be constrained by the academic level selected for an inquiry. Setting up this filter displays only admit levels related to the selected academic level on the choice list on the Create Inquiry page.

To set up this choice list filter:

1. Sign in as a Setup user.
2. Create and activate a sandbox.
3. Navigate to Application Composer.
4. Select Sales from the Application drop-down list.
5. Expand Standard Objects.
6. Expand Sales Leads and click Fields.
7. On the Custom tab, click Admit Level from the Display Label list.

The Edit Fixed Choice List: Admit Level page is displayed.
8. In the List of Values section, select the Constrain list by parent field value selection check box.
9. Select the academic level from the Parent Choice List drop-down list.
10. Click the Create a New Value Map icon.
11. On the Create Value Map dialog box, select the appropriate Admit Level value for each Academic Level value.
12. Click OK.
13. Click Save and Close.
14. Publish the sandbox.
11 Enabling Households

Enabling Households Icon on the Navigator and Welcome Springboard

Oracle Sales Cloud for Higher Education does not present the Households icon by default. You must enable it according to your requirement.

To enable the Households icon on the Navigator and Welcome Springboard:

1. Sign in as an administrator.
2. Create and activate a sandbox.
5. Select Yes from the Visible drop-down list.
6. Select Yes from the Show on Welcome Springboard drop-down list.
7. Click Save and Close.
8. Publish sandbox.
12 Integrating Oracle Eloqua with Sales Cloud for Higher Education

Oracle Eloqua to Sales Cloud Integration: Overview

This topic briefly describes how Oracle Sales Cloud for Higher Education leverages the Oracle Eloqua (Marketing Cloud) to plan, manage and track student recruitment activities. The Oracle Eloqua and Sales Cloud for Higher Education integration works to:

- Import data from objects to Oracle Eloqua
- Create and update inquiries
- Create and update constituents in Sales Cloud

Note: For detailed information on the tasks that you must perform to implement the Oracle Eloqua and Sales Cloud for Higher Education integration, see Oracle Eloqua Help Center.

Terms and Definitions

Oracle Sales Cloud for Higher Education uses terms that are referred to differently in Oracle Eloqua. The following table describes the difference in terminology.

<table>
<thead>
<tr>
<th>Term in Oracle Sales Cloud for Higher Education</th>
<th>Term in Oracle Eloqua</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inquiries</td>
<td>Prospect Program Interests</td>
<td>Inquiries for prospective students refer to information related to a student's academic interests, entry year, and academic level.</td>
</tr>
<tr>
<td>Constituents</td>
<td>Contacts</td>
<td>Constituents in higher education are prospective students; contacts from an organization such as teachers, administrators, coaches or human resource representatives; and people related to prospective students such as parents, relatives, or friends.</td>
</tr>
</tbody>
</table>

Related Topics

- Oracle Eloqua Help Center
Configuring Prospect Program Interest Key

This topic describes how you can prevent duplicate inquiry records from being created for Oracle Eloqua and Sales Cloud for Higher Education integration.

If you are integrating to Student Engagement (Oracle Eloqua Marketing Cloud for Higher Education), keeping the inquiry records in sync and preventing duplicate records is critical. Each inquiry record has a unique ID in Student Engagement called Prospect Program Interest Key. The Prospect Program Interest Key field also exists in Sales Cloud for Higher Education to ensure that the records are kept in sync. You must populate the Prospect Program Interest Key by using the data that defines an inquiry record, based on your business practice and prospective student data.

You must create a groovy script for this field to link and store the values that you decide to use for the Prospect Program Interest Key and to validate that there is no other duplicate values on any other record. The logic used to construct the value for the Prospect Program Interest Key must match the format used in Oracle Eloqua. If a new inquiry record is created with similar data as an existing inquiry record with a unique ID, you will receive an error message. This ensures that you do not create duplicate inquiry records for your institution.

Additional steps are required to implement and configure the groovy scripts for the Prospect Program Interest Key. You must configure the Inquiry object and then implement the following changes on the Inquiry object.

Creating Object Functions for the Prospect Program Interest Key

You must create the following object functions:

- BuildPPIKey: Build Prospect Program Interest Key value
- IsPPIKeyUnique: Is Prospect Program Interest Key Unique

Creating Object Function for BuildPPIKey

To create an object function for BuildPPIKey:

1. Sign in as an administrator.
2. Ensure that you are in an active sandbox.
3. Navigate to Application Composer.
4. Go to Application > Sales > Standard Objects.
5. Expand the Inquiry Object and click Server Scripts.
8. On the Create Object Function page, specify the information provided in the following table.
   
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Function Name</td>
<td>BuildPPIKey</td>
</tr>
</tbody>
</table>


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Integrating Oracle Eloqua with Sales Cloud for Higher Education

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Returns drop-down list</td>
<td>String</td>
</tr>
</tbody>
</table>

| Description | Build Prospect Program Interest Key value |

b. Paste the following groovy script into the Edit Script region:

```groovy
def ppiKey = ''
def ppiEmail = nvl(PrimaryContactEmailAddress,'')
def ppiInst = nvl(__ORAHE__Institution_c, '')
def ppiCampus = nvl(__ORAHE__Campus_c, '')
def ppiAcadLevel = nvl(__ORAHE__AcademicLevel_c, '')
def ppiAdmitPeriod = nvl(__ORAHE__AdmitPeriod_c, '')

//Adjust the if statement and concatenation if you wish to use additional/fewer fields.
if (ppiEmail > ' ' && ppiInst > ' ' && ppiCampus > ' ' && ppiAcadLevel > ' ' && ppiAdmitPeriod > ' ')
{
    ppiKey = ppiEmail + '+' + ppiInst + '+' + ppiCampus + '+' + ppiAcadLevel + '+' + ppiAdmitPeriod
}
else
{
    ppiKey = ''
}
return ppiKey
```

c. Click Validate.
d. Click Save and Close.

> Note: For additional information on creating sandboxes, refer to the Oracle Sales Cloud Extending Sales guide.

Creating Object Function for IsPPIKeyUnique

To create an object function for IsPPIKeyUnique:

1. Sign in as an administrator.
2. Ensure that you are in an active sandbox.
3. Navigate to Application Composer.
4. Go to Application > Sales > Standard Objects.
5. Expand the Inquiry Object and click Server Scripts.
8. On the Create Object Function page, specify the information provided in the following table.

a. In the Definition region:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Function Name</td>
<td>IsPPIKeyUnique</td>
</tr>
</tbody>
</table>

Returns drop-down list Boolean
b. In the Parameters region, select **Actions > Add**. A new parameter row appears.

c. Enter the parameter name and type as provided in the following table.

<table>
<thead>
<tr>
<th>Parameter Name</th>
<th>Parameter Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>key</td>
<td>String</td>
</tr>
<tr>
<td>ID</td>
<td>Long (Integer)</td>
</tr>
</tbody>
</table>

d. Paste the following groovy script into the Edit Script region:

```groovy
def isKeyUnique = true

// Need to have a key value to search for, otherwise return true
if (key != '') {
    def vo = newView('Lead')
    def vc = newViewCriteria(vo)

    def vcr = vc.createRow()
    def vci = vcr.ensureCriteriaItem('__ORAHE__ProspectProgramInterestKey_c')
    vci.setOperator('=')
    vci.setValue(key)
    vc.insertRow(vcr)
    vo.appendViewCriteria(vc)
    vo.executeQuery()

    while (vo.hasNext()) {
        def rec = vo.next()
        if (rec.LeadId != ID) {
            isKeyUnique = false;
            break
        }
    }
}

return isKeyUnique
```

e. Click **Validate**.

f. Click **Save and Close**.

**Related Topics**

- Using Sandboxes: Explained
Creating Triggers for the Inquiry Object

You must create the following triggers for the inquiry standard object:

- Before Insert in Database
- Before Update in Database

Creating the Before Insert in Database Trigger

To create the Before Insert in Database trigger:

1. Sign in as an administrator.
2. Ensure that you are in an active sandbox.
3. Navigate to Application Composer.
4. Go to Application > Sales > Standard Objects.
5. Expand the Inquiry Object and click Server Scripts.
7. On the Triggers tab, Object Triggers region, select Actions > Add. The Create Object Trigger window appears.
8. In the Name region, specify the information as provided in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trigger</td>
<td>Before Insert in Database</td>
</tr>
<tr>
<td>Trigger Name</td>
<td>PopulatePPIKey</td>
</tr>
</tbody>
</table>

9. Paste the following groovy script into the Edit Script region in the Trigger Definition window:

```groovy
def ppikey = BuildPPIKey()
def isUniqueKey = IsPPIKeyUnique(ppikey, LeadId)
def msg = adf.util.__ORAHE__getMessage('AHE_DUP_PROSPROGINT_KEY');
if (isUniqueKey != true)
{
    throw new oracle.jbo.ValidationException(msg);
}
if (__ORAHE__ProspectProgramInterestKey_c != ppikey)
{
    setAttribute('__ORAHE__ProspectProgramInterestKey_c',ppikey)
}
```

10. Click Save and Close.

Creating the Before Update in Database Trigger

To create the Before Update in Database trigger:

1. Sign in as an administrator.
2. Ensure that you are in an active sandbox.
3. Navigate to Application Composer.
4. Go to Application > Sales > Standard Objects.
5. Expand the Inquiry Object and click Server Scripts.
7. On the Triggers tab, Object Triggers region, select Actions > Add. The Create Object Trigger window appears.
8. In the Name region, specify the information as provided in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trigger</td>
<td>Before Update in Database</td>
</tr>
<tr>
<td>Trigger Name</td>
<td>UpdatePPIKey</td>
</tr>
</tbody>
</table>

9. Paste the following groovy script into the Edit Script region in the Trigger Definition window:

```groovy
def ppikey = BuildPPIKey()
def isUniqueKey = IsPPIKeyUnique(ppikey, LeadId)
def msg = adf.util.__ORAHE__getMessage('AHE_DUP_PROSPROGINT_KEY');
if (isUniqueKey != true) {
    throw new oracle.jbo.ValidationException(msg);
}
if (__ORAHE__ProspectProgramInterestKey_c != ppikey) {
    setAttribute('__ORAHE__ProspectProgramInterestKey_c', ppikey)
}
```

10. Click Save and Close.

Exporting Programs of Interest and Organizations: Explained

This topic describes how to export programs of interest and organizations.
Higher education leverages the integration with Oracle Eloqua to acquire inquiry and organization data.

Exporting Programs of Interest (Sales Product Catalog)

Exporting programs of interest data from Oracle Sales Cloud and loading the data into Oracle Eloqua Major Code Lookup tables is required to match incoming inquiry data to the ProductGroup ID of the program interest.

To export programs of interest:

1. Sign in as an administrator and navigate to Setup and Maintenance.
2. Enter Schedule Export Processes in the Search field and select the Schedule Export Processes task from the search results.
3. Go to Actions > Create.
4. On the Create Export Process Definition: Enter Basic Information page, enter a name for the export and click Next.
5. On the Create Export Process Definition: Configure Export Objects page, in the Export Objects region, go to Actions > Create.
6. On the Manage Export Objects dialog box, move the Product Group Details to the Selected Objects section and click Done.
8. On the Edit Filter Criteria dialog box, click X, to remove the LastUpdateDate from the criteria.
9. From the Add Fields drop-down list, select CreationDate.
10. From the Creation Date drop-down list, select ONORAFTER.

Note: Select a date that is prior to the product group creation date.

11. Click Save.
12. On the Create Saved Search dialog box, enter a name for the criteria and click OK.
13. On the Edit Filter Criteria dialog box, click OK.
14. From the Attribute Name column, expand ProductGroupDetailExpPVO.
15. Deselect the check boxes from the Enabled column for the fields that you do not want to export and click Next.

You must leave the ProdGroupId and ProdGroupName fields checked.


You must leave the Schedule Type as Immediate.

17. Click Activate.

On completion of the process, download the exported file as named in step 4 to Oracle Eloqua.

Exporting Organizations
Exporting organization data from Oracle Sales Cloud and loading the data into Oracle Eloqua School Code Lookup tables is required to match inquiry data to the party ID of the organization.

To export organization data:

1. Sign in as an administrator and navigate to Setup and Maintenance.
2. Enter Schedule Export Processes in the Search field and select the Schedule Export Processes task from the search results.
3. Go to Actions > Create.
4. On the Create Export Process Definition: Enter Basic Information page, enter a name for the export and click Next.
5. On the Create Export Process Definition: Configure Export Objects page, in the Export Objects region, go to Actions > Create.
6. On the Manage Export Objects dialog box, move the Product Group Details to the Selected Objects section and click Done.
8. On the Edit Filter Criteria dialog box, click X, to remove the LastUpdateDate from the criteria.
9. From the Add Fields drop-down list, select CreationDate.
10. From the Creation Date drop-down list, select ONORAFTER.

Note: Select a date that is prior to when organizations were created.

11. Click Save.
12. On the Create Saved Search dialog box, enter a name for the criteria and click OK
13. On the Edit Filter Criteria dialog box, click OK.
14. From the Attribute Name column, expand OrganizationProfileExpVO.
15. Deselect the check boxes from the Enabled column for the fields that you do not want to export and click Next.

You must leave the following fields checked:
- OrganizationName
- PartyID
- __ORAHE__ACT_c
- __ORAHE__CEEB_c
- __ORAHE__DLINumber_c
- __ORAHE__FICE_c
- __ORAHE__IPEDS_c
- __ORAHE__NCES_c
- __ORAHE__UCAS_c


You must leave the Schedule Type as Immediate.
17. Click Activate.

On completion of the process, download the exported file as named in step 4 to Oracle Eloqua.

Related Topics
- Configuring Programs of Interest Using Root Product Groups in Oracle Sales Cloud for Higher Education: Explained
- Oracle Eloqua Help Center

Creating Engage and Profiler Subtabs: Explained

Creating the Profiler and the Engage subtabs enable you to make your outreach activities interactive.

Adding the Profiler Subtab

Add this subtab to view the interactions made with an inquiry, including the lead score reported and the various data collected from different marketing campaigns and forms.

⚠️ Note: You must install the Profiler app for your instance of Oracle Eloqua and Sales Cloud for Higher Education integration. To install the Profiler app, see the Oracle Eloqua Help center.

To add the Profiler subtab:
1. Sign in as a sales administrator and navigate to Application Composer.
2. Go to Application Sales.
3. Expand Objects -> Standard Objects -> Sales Lead -> Pages.
4. On the Sales Lead: Pages page, select the Simplified Pages tab.
5. In the Details Page Layouts region, click the name of the layout you previously created in the Duplicating Higher Education Layouts.
6. On the Details Layout page, in the Subtabs Region, click the Add icon.
7. On the Details Layout: Create Subtab page, select the Web content radio button and click Next.
8. On the Details Layout: Create Subtab page, Basic Information region, enter Profiler in the Display Label field.
9. In the Description field, enter Profiler.
10. Click the Change Icon link.
11. From the Icons dialog box, select an icon you want to use for the tab.
12. In the URL Definition, Edit Script region, enter the following link: //profiler return "https://login.eloqua.com/apps/salesTools/profiler?emailAddress=\"\".\"\"nvl(PrimaryContactEmailAddress, \"\")."
13. If more than one details page layout exist, click Next to optionally select other details page layouts which will display this subtab.
14. Click Save and Close, and then click Done.
15. Publish your sandbox.

The Profiler subtab is now visible on the Sales Inquiry page.

Adding the Engage Subtab
Add this tab to create personalized emails to be sent to an inquiry based on templates created by your institution. This also enables you to maintain consistent branding across outreach activities with the inquiry.

Note: You must install the Engage app for your instance of Oracle Eloqua and Sales Cloud for Higher Education integration. To install the Engage app, see the Oracle Eloqua Help center.

To add the Engage subtab:
1. Sign in as a sales administrator and navigate to Application Composer.
2. Go to Application Sales.
3. Expand Objects-> Standard Objects- Sales Lead- Pages.
4. On the Sales Lead: Pages page, select the Simplified Pages tab.
5. In the Details Page Layouts region, click the name of the layout you previously created in the Duplicating Higher Education Layouts.
6. On the Details Layout page, in the Subtabs Region, click the Add icon.
7. On the Details Layout: Create Subtab page, select the Web content radio button and click Next.
9. In the Description field, enter Engage.
10. Click the Change Icon link.
11. From the Icons dialog box, select an icon you want to use for the tab.
12. From the URL Definition, Edit Script region, enter the following link: //engage return "https://login.eloqua.com/apps/salesTools/engage?sendTemplateToContacts\"\"nvl(PrimaryContactEmailAddress, \"\")."
13. If more than one details page layout exist, click Next to optionally select other details page layouts which will display this subtab.
14. Click Save and Close, and then click Done.
15. Publish your sandbox.

The Engage subtab is now visible on the Sales Inquiry page.

Related Topics
• Installing the Profiler App
• Installing the Engage App
Glossary

academic level
Academic level are categories of programs, for example, undergraduate, graduate, certificate, and continuing education, which can be used to assign inquiries to the appropriate student recruiters.

job role
Job roles refer to the job functions which users must perform in an organization. Job roles provide users with access to a specific application function and the data required to execute a job. Examples of job roles in higher education are Admissions Coordinators and Student Recruiters.

programs of interest
Programs of interest refer to the academic programs that a prospective student might be interested in such as art, biology, history, chemistry, and so on.

prospective student
A prospective student is someone who has expressed interest in enrolling to your institution.

resource role
Resource roles indicate the role a resource plays as an individual, or within a resource team.

role
Controls access to application functions and data.

role mapping
A relationship between one or more roles and one or more assignment conditions. Users with at least one assignment that matches the conditions qualify for the associated roles.

setup user
A user provisioned with the job roles and abstract roles required to perform implementation tasks.

territory
The jurisdiction of responsibility of a student recruiter or admissions coordinator over a set of inquiries and organizations. Territories serve as a basis for planning outreach activities and recruiting prospective students.