Oracle Sales Cloud
Configuring Sales for B2C

Release 13 (update 18C)
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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><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></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 provides information on how sales administrators and managers can configure their applications for use with a Business to Consumer (B2C) environment.

This guide describes how to configure your applications for use in a B2C environment, including minor modifications required to the springboard and to the following objects for use with B2C:

- Contact
- Activity
- Opportunity
- Lead

Related Guides

You can refer to the following guides to learn more about configuring your applications.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud Extending Sales</td>
<td>Describes how to create and extend objects, and configure the user interfaces and navigation menus.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Groovy Scripting Reference for Application Composer</td>
<td>Explains the basics of how to use the Groovy scripting language to enhance your applications.</td>
</tr>
</tbody>
</table>

Related Topics

- Oracle Help Center
2 Introduction to B2C Configuration

Configuring Oracle Sales Cloud for B2C: Overview

Regardless of the type of sales environment you’re in (whether Business to Business (B2B) or Business to Consumer (B2C)), Oracle Sales Cloud meets your needs with almost no changes required. Only one area is specifically optimized for B2B, and it’s in the area of account and contact management. This restriction means that, if you’re in a B2C environment where your end users sell directly to individual people (and not to businesses or corporations), then you must first make some minor modifications so that your users can more easily track those people (consumers). Read this guide to learn how to enable a B2C deployment of Oracle Sales Cloud.

Where Changes Are Required in a B2C Environment?

If your users are selling directly to individual people in a B2C environment, then you can make similar changes across these objects:

- Contact
- Opportunity
- Activity
- Lead

You can also make changes to the springboard itself.

What Other Changes Are Required?

In general, you can make similar changes across all objects.

For example, you can do the following:

- You can change the field label from Account to Customer for some pages.
- You can show various fields for household use, where required.

This guide describes the previous changes in detail, as well as additional changes that are specific to each object.
3 Setting Up a B2C Sales Environment for Contacts

Configuring the Contact Pages for B2C: Overview

B2C transactions are sold to individuals directly, rather than to customer accounts. To reflect sales to individuals, you must perform some setup tasks to enable users to communicate with prospects or individual customers rather than account contacts.

This chapter describes how to configure the Contact pages for B2C. It includes the following topics:

- Setting the Default Contact Type
- Configuring the Contact Create and Edit Pages
- Hiding My Business Contacts from List Management
- Enabling Territory Assignment for Prospect

Setting the Default Contact Type: Worked Example

This topic describes how to disable Contact and set the default contact type to Prospect. The Contact type is a B2B concept, and it’s not used in B2C. In the following procedure, you hide some fields, and expose other fields that are more appropriate when selling to individuals instead of companies.

Disabling Contact and Setting the Default Contact Type to Prospect

1. Navigate to Setup and Maintenance.
2. In the Search Tasks field, enter Manage Standard Lookups and click Search.
3. Click the Manage Standard Lookups item.
4. Enter ZCA_CONTACT_TYPE in the Lookup Type field and click Search.
5. Deselect the Enabled check box for Contact.
6. Click Save and Close.
7. In the Search Task box, enter Manage Administrator Profile Values and click Search.
   This figure shows the search box to find the Manage Administrator Profile Values.

   ![Search](image)

   Manage Administrator Profile Values
   Match With: Tasks, Task Lists, Business Objects

8. Click the Manage Administrator Profile Values item.
9. In the Profile Option Code field, enter ZCA_DEFAULT_CONTACT_TYPE and click Search.
10. In the Profile Value drop-down list, select Prospect.
11. Click **Save and Close**.

### Configuring the Contact Create and Edit Pages: Worked Example

This topic describes how to configure the Create and Edit pages for the Contact object, to prepare it for use with B2C.

### Configuring the Create Pages

To configure the Create pages:

1. Navigate to Application Composer, select the **Common** application, and expand **Standard Objects**.
2. Expand **Contact**.
3. Click **Pages** on the Simplified Pages tab.
4. Edit the **Create Contact** layout.
   
   ![Create Contact layout edit option](image)

   This figure shows the Create Contact layout edit option.

5. Click **Edit** next to **Create Contact**.
   
   ![Creation Layout: Default Layout](image)

   This figure shows the Creation Layout Default Layout edit option.
6. Hide the **Type** field by moving it from the **Selected Fields** list to the **Available Fields** list.
7. Display the **Job Title** and **Work Phone** fields by moving them from the **Available Fields** list to the **Selected Fields** list.
8. Display the **Household**, **Gender**, and **Home Phone** fields by moving them from the **Available Fields** list to the **Selected Fields** list.
9. Click **Save and Close**.
10. Click **Done**.

**Configuring the Edit Pages**

To configure the Edit pages:

1. Edit the **Edit Contact** layout.
2. Edit the Contact Overview Form.
   This figure shows the Contact Overview Form edit option.

3. Display the **Type**, **Household**, **Gender**, and **Home Phone** fields by moving them from the **Available Fields** list and to the **Selected Fields** list.
4. Display the **Influence Level** and **Buying Role** fields by moving them from the **Available Fields** list to the **Selected Fields** list.
5. Click **Save and Close**.
6. Click **Done**.
Hiding My Business Contacts from List Management: Worked Example

This topic describes how to hide the My Business Contacts saved search list from List Management. The My Business Contacts saved search applies only to contacts at companies. When selling to individuals, business contacts don't apply so you can hide this saved search from your users.

Hiding the My Business Contacts Saved Search from List Management

To hide the My Business Contacts saved search:

1. Navigate to Contacts.
2. Select My Business Contacts from the List drop-down list if it isn't already selected.
3. Click the drop-down list icon again and select Create or Edit Lists.
4. In the Saved Search drop-down list, select Personalize.
5. On the Personalize Saved Searches dialog box, deselect the Show in Search List check box.

Note: If My Business Contacts has been set as the default search, you must select another list as the default search before you can hide it.

6. Click OK.

Enabling Territory Assignment for Prospect: Worked Example

This topic describes how to enable territory assignment for the "Prospect" contact type. Enabling territory assignment for prospects is useful when you want to enable specific territories for specific sales representatives (for example, if you divided your sales territories by geographic area). Because some companies don’t assign sales representatives to specific territories, this process is optional.

Enabling Territory Assignment for Contact Type "Prospect"

1. Navigate to Setup and Maintenance.
2. In the Search Tasks field, enter Manage Standard Lookups and click Search.
3. Click the Manage Standard Lookups item.
4. In the Lookup Type field, enter ORA_HZ% and click Search.
5. In the search results, click the row for Contact Search Record Set Filter.
6. Deselect the Enabled check boxes for the Records in accounts that I own and Records in accounts where I am on the account rows.
7. Click Save and Close.
8. In the Search Tasks box, enter Manage Administrator Profile Values and click Search.
9. Click the Manage Administrator Profile Values item.
10. In the Profile Option Code field, enter ZCA_ASSIGNMENT_ACCT% and click Search.
11. Click New to add a new profile value.
12. Select a Profile Level of Site, and enter ZCA_PROSPECT for the Profile Value. Adding this value enables territory assignment for prospects.
13. Click Save and Close.
4 Setting Up a B2C Sales Environment for Opportunities

Configuring the Opportunity Pages for B2C: Overview

This chapter describes how to configure the Opportunity pages for B2C. It contains the following topics:

- Hiding the Account Field
- Renaming the Primary Contact field
- Hiding the Contacts subtab
- Copying the Primary Contact value to the Account field

Hiding the Account Field on Opportunity Pages: Worked Example

This topic describes how to hide the Account field on the Opportunity Create and Edit pages using Application Composer. You hide the Account field because in a B2B scenario, you sell to other businesses or accounts. While in B2C, you sell to a single contact and so the concept of an account doesn't apply. You can do this when configuring the Opportunity pages for B2C.

Hiding the Account Field

1. Ensure that you’re in a sandbox.
2. Navigate to Application Composer, select the Sales application, and expand Standard Objects.
3. Expand Opportunities.
4. Click Pages.
5. Under Creation Page Layouts, select the default layout to edit.
6. Click the Edit icon in the Create Opportunity region.
7. Hide the Account field by moving it from the Selected Fields list to the Available Fields list.
8. Click Save and Close.
9. Click Done.
10. Under Details Page Layouts, click Default Layout, then click Edit.
11. Edit the Summary section.
12. Hide the Account field by moving it from the Selected Fields list to the Available Fields list.
13. Click Save and Close.
14. Publish your sandbox.
Renaming Primary Contact Field: Worked Example

This topic describes how to rename the Primary Contact field to Client or Customer. You must do this when configuring Opportunity pages for B2C.

Renaming Primary Contact to Client

To perform this task, you use the User Interface Text tool.

1. Navigate to Configuration, User Interface Text.
2. Click Search and Replace.
3. Enter the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search For - Singular</td>
<td>^Primary Contact$</td>
</tr>
<tr>
<td>Replace With - Singular</td>
<td>Client</td>
</tr>
<tr>
<td>Search For - Plural</td>
<td>^Primary Contacts$</td>
</tr>
<tr>
<td>Replace With - Plural</td>
<td>Clients</td>
</tr>
<tr>
<td>Match Case</td>
<td>Selected</td>
</tr>
<tr>
<td>Include in Search</td>
<td>Select the User Interface Text and Global Menu Label Text check boxes only.</td>
</tr>
</tbody>
</table>

4. Click Preview Changes.

After several minutes a list of preview results appears.

5. Examine the list of results. Hovering your mouse over the Description text displays the entire description for each item.

6. Click Save and Close.

The number of items that were updated is shown.

7. Test your updates by examining the Opportunity component to ensure that all instances of Primary Contact have been replaced by Client.

Hiding the Contacts Subtab: Worked Example

This topic describes how to hide the Contacts subtab when configuring the Edit Opportunity pages for B2C. Contacts are applicable only when selling to businesses.
Hiding the Contacts Subtab

1. Navigate to Application Composer, select the Sales application, and expand Standard Objects.
2. Expand Opportunity.
3. Click Pages.
4. Select the default Details Page layout and click Edit.
5. Click the arrows icon.
6. Hide the Contacts subtab by selecting Contacts in the Selected Subtabs list and moving it to the Available Subtabs list.

This figure shows the Configure Subtabs option with contacts selected.

7. Click OK.
8. Click Done.

Copying the Primary Contact Value to the Account Field: Worked Example

This topic shows you how to use a Groovy script to copy the Primary Contact value over to the Account field.

Note: The Account field must be populated in the background because it drives functionality such as assignment.

This process involves the following two tasks:

1. Create an object function.
2. Schedule the process.
Creating an Object Function

Use these steps to create an object function that allows a Groovy script to copy the Primary Contact value to the Account field.

1. Sign in with your sales administrator credentials.
2. Ensure that you’re in a sandbox.
3. From the Navigator, click Application Composer.
4. Select the Sales object tag.
5. Expand the list of Standard Objects.
6. Expand Opportunities and click Server Scripts.
7. Click the Object Functions tab.
8. Click the Add icon to add a new object function.
9. In the Function Name field on the Create Object Function page, provide a name for the new object function, such as CopyPrimaryContactValues.
10. In the Visibility field on the Create Object Function page, select Callable by External Systems.
11. In the Edit Script area under Parameters, provide a Groovy script that copies the Primary Contact field value to the Account field.
12. Click Validate to ensure your script works.
13. Click Save and Close.
14. Publish your sandbox.

Scheduling the Process

Use these steps to schedule the process that runs the Groovy script to copy the Primary Contact value to the Account field.

1. Sign in with your sales administrator credentials.
2. From the Tools list in the Navigator, click Scheduled Processes.
3. Click Schedule New Process.
4. In the Name field on the Schedule New Process page, search for and select Schedule Custom Groovy Object Functions - Developer Preview.
5. Click OK.
6. On the Process Details page, provide the following information:

   ☏ Note: Entries on this page are case-sensitive.
   - Object Name: REST resource name of the object for which the object function is defined. Type Opportunities.
   - Object Function: Name of object function you created in Application Composer.
   - You can set this process to be executed weekly or as soon as possible to test it.

7. Click Submit.
5 Setting Up a B2C Sales Environment for Activities

Configuring the Activity Pages for B2C: Overview

This chapter describes how to configure the Activity pages for B2C. It includes the following topics:

- Renaming Account to Customer
- Hiding the Primary Contact for Activity
- Hiding the Contacts Subtab in Activity
- Hiding the Record Type Lookup Value for Activity

Renaming Account to Customer in Activity: Worked Example

This topic describes how to rename Account to Customer throughout the user interface. In B2C, you sell to customers, not to accounts. To make this modification, you use the User Interface Text tool.

> Note: If you already performed these steps for Opportunity, you don’t have to repeat them for Activity.

Renaming Account to Customer

1. Navigate to Configuration > User Interface Text.
2. Click Search and Replace.
3. Enter the following information:

<table>
<thead>
<tr>
<th>Field</th>
<th>Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search For - Singular</td>
<td>^Account$</td>
</tr>
<tr>
<td>Replace With - Singular</td>
<td>Customer</td>
</tr>
<tr>
<td>Search For - Plural</td>
<td>^Accounts$</td>
</tr>
<tr>
<td>Replace With - Plural</td>
<td>Customers</td>
</tr>
<tr>
<td>Match Case</td>
<td>Selected</td>
</tr>
</tbody>
</table>
4. Click **Preview Changes**.
   After a while (it might take several minutes), a list of preview results appears.

5. Examine the list of results. Hovering your mouse over the Description text displays the entire description for each item.

6. Click **Save and Close**.
   The number of items that were updated is shown.

7. Test your updates by examining the Activity components to ensure that all instances of Account have been replaced by Customer.

---

### Hiding the Primary Contact for Activity: Worked Example

This topic describes how to hide the Primary Contact field on the Call Report and Task Create and Edit pages using Application Composer. You hide the Primary Contact field because in a B2B scenario, you sell to multiple contacts, while in B2C, you sell to a single contact (and thus the concept of a “primary contact” doesn’t apply).

> **Note:** Perform this step only if Household isn’t used.

### Hiding the Primary Contact

1. Navigate to Application Composer, select the **Sales** application, and expand **Standard Objects**.
2. Expand **Activity**.
3. Verify that you’re on the Simplified Pages tab, then click **Pages**.
4. Select **Default Layout** under Call Report Create and edit the Creation Page Layout.
5. Edit Call Report Create.
6. Display the Primary Contact field by moving it from the **Selected Fields** list to the **Available Fields** list.
7. Click **Save and Close**.
8. Click **Done**.
9. Under Details Page Layouts, click **Default Layout** for Call Report, then click **Edit**.
10. Edit the Summary section.
11. Display the Primary Contact field by moving it from the **Selected Fields** list to the **Available Fields** list.
12. Click **Save and Close**.
13. Repeat steps 5 through 13 for Task.

---

### Hiding the Contacts Subtab in Activity: Worked Example

This topic describes how to hide the Contacts subtab for the Call Report, Appointment, and Task components of the Activity object. Contacts are used only when selling to businesses, so the Contacts subtab isn’t used for B2C.
Hiding the Contacts Subtab

1. Navigate to Application Composer, select the Sales application, and expand Standard Objects.
2. Expand Activity.
3. Click Pages.
4. Select the default Details Page layout and click Edit.
5. Click the Hide, Show, or Reorder Subtabs icon (the arrows icon under Subtabs Region).
6. Hide the Contacts subtab by selecting Contacts in the Selected Subtabs list and moving it to the Available Subtabs list.
7. Click OK.
8. Click Done.
9. Repeat steps 1 through 5 for Task and for Appointment.

Hiding the Record Type Lookup Value for Activity: Worked Example

This section describes how to hide the Record Type lookup value for the Activity component. This value is only relevant to B2B.

Hiding the Record Type Lookup Value

1. Navigate to Setup and Maintenance.
2. Under Search: Tasks, enter Manage Standard Lookups and click Search.
3. Click Manage Standard Lookups.
4. Under Lookup Type, enter ZCA_RECORD_TYPE.
5. Click Search.
6. Under the Lookup Codes list, deselect the Enabled check box for the Account item under Meaning, and select the Enabled check box for the Household item.
6 Setting Up a B2C Sales Environment for Leads

Configuring the Lead Pages for B2C: Overview

B2C transactions are sold to individuals directly, rather than to customer accounts. You must perform some setup tasks to allow users to create leads for single contacts rather than for accounts.

This chapter describes how to configure the Lead pages for B2C. It includes the following topics:

- Hiding the Account Field for Lead
- Relabeling the Primary Contact Field to Contact
- Hiding the Contacts Subtab From the Lead Edit Page
- Updating the Copy Map to Copy the Lead Contact Value
- Writing a Groovy Script to Change the Contact Type

Hiding the Account Field for the Lead Object: Worked Example

This topic describes how to hide the Account field from the List, Create, and Edit pages for the Lead object. This field isn’t relevant to B2C because you won’t be selling to accounts.

Hiding the Account Field from the Lead List, Create, and Edit Pages

1. Navigate to Application Composer, and expand Standard Objects.
2. Expand Sales Lead.
3. Click Pages.
4. On the Simplified Pages tab, select Default Layout on the Creation Pages layout and edit it.
5. Hide the Account field by moving it to the Available Fields list.
6. Click Save and Close.
7. Click Done.
8. In the Landing Page region, click Edit Summary Table.
9. Display the Account field by moving it to the Selected Fields list.
10. Click Save and Close.
11. Click Done.
12. In the Details Page Layout region, select the default layout and edit it.
13. Hide the Account field by moving it to the Available Fields list.
14. Click Save and Close.
15. Click Done.
Relabeling the Primary Contact Field to Contact: Worked Example

This topic describes how to relabel the Primary Contact field to Contact when configuring the Lead object for B2C. You rename the Primary Contact field because in a B2B scenario, you sell to multiple contacts, while in B2C, you sell to a single contact (and thus the concept of a "primary contact" doesn’t apply).

Relabeling the Primary Contact Field to Contact

To relabel the Primary Contact field:

1. Navigate to **Configuration > User Interface Text**.
2. Click **Search and Replace**.
3. Enter the following information:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search For - Singular</td>
<td>^Primary contact$</td>
</tr>
<tr>
<td>Replace With - Singular</td>
<td>Contact</td>
</tr>
<tr>
<td>Search For - Plural</td>
<td>^Primary Contacts$</td>
</tr>
<tr>
<td>Replace With - Plural</td>
<td>Contacts</td>
</tr>
<tr>
<td>Match Case</td>
<td>Selected</td>
</tr>
<tr>
<td>Include in Search</td>
<td>Select the User Interface Text and Global Menu Label Text check boxes only.</td>
</tr>
</tbody>
</table>

4. Click **Preview Changes**.

After a while (it might take several minutes) a list of preview results appears.

5. Examine the list of results. Hovering your mouse over the **Description** text displays the entire description for each item.

6. Click **Save and Close**.

The number of updated items is shown.

7. Test your updates by examining the Sales Lead component to ensure that all instances of the Primary Contact object have been replaced by Contact.
Hiding the Contacts Subtab from the Lead Edit Page: Worked Example

This topic describes how to hide the Contacts subtab from the Edit page for the Lead object. The Contacts subtab is not relevant to B2C.

Hiding the Contacts Subtab from the Lead Edit Page

1. Navigate to Application Composer, select the Sales application, and expand Standard Objects.
2. Expand Sales Lead.
3. Click Pages.
4. In the Details Page Layouts region, select the default layout and edit it.
5. Click the Hide, Show, or Reorder Subtabs icon (the arrows icon under Subtabs Region).
6. Hide the Contacts subtab by selecting it under Selected Subtabs and moving it to Available Subtabs.
7. Click OK.
8. Click Done.

Updating the Copy Map to Copy the Lead Contact Value: Worked Example

This topic describes how to update the copy map to copy over the Lead contact value into the opportunity’s Customer field.

Updating the Copy Map to Copy the Lead Contact Value

In this step, you update the copy map to copy over the Lead contact value into the opportunity Customer field. Copy maps are a declarative way to specify what fields are copied among objects. The functionality for converting a lead to an opportunity uses the predefined Copy Lead To Opportunity Map copy map feature.

1. Expand Advanced Setup and click Copy Maps (in left pane of the Application Composer).
2. Click Copy Lead to Opportunity Map.
3. Under the Attribute Mappings section, in the row for TargetPartyId, select PrimaryContactId from the drop-down list in the From column.
4. Click Save and Close.
Writing a Groovy Script to Change the Contact Type: Worked Example

This topic describes how to write a Groovy script to change the contact type to SALES_PROSPECT when updating the Lead object for B2C. This process is optional: do it only if you want to change the Contact Type label to SALES_PROSPECT.

Writing a Groovy Script to Change the Contact Type

To write Groovy script to change the contact type to SALES_PROSPECT:

1. Navigate to Configuration > Application Composer.
2. Expand Standard Objects.
3. Expand Contacts.
4. Click Server Scripts.
5. Click the Triggers tab.
6. Click Create.
7. Give the trigger a descriptive name (for example, "ChangeContactType").
8. Enter the following into the trigger definition field:
   ```groovy
   if (CreatedByModule == 'FUSION_MKT') {
       def personParty = PersonParty
       if (personParty != null) {
           def usageCode = personParty.getAttribute("PartyUsageCode")
           if (usageCode == 'CONTACT') {
               personParty.setAttribute("PartyUsageCode", "SALES_PROSPECT")
           }
       }
   }
   
   9. Click Validate.
10. Click Save and Close.
7 Setting Up a B2C Sales Environment for the Springboard

Configuring the Springboard for B2C: Overview

You can configure the springboard so it makes sense for your users in a B2C sales environment.

This chapter describes how to add your features to the springboard for Oracle Sales Cloud. It includes the following topics:

- Hiding Accounts from the Springboard
- Showing Households on the Springboard

Hiding Accounts from the Springboard: Worked Example

This topic describes how to hide the Accounts item so that it’s not visible from the springboard.

Hiding Accounts from the Springboard

1. Navigate to Application Composer, Tools, Structure.
2. Expand Sales.
3. Click Accounts.
4. Select No in the Show on Welcome Springboard drop-down list.
5. Click Save and Close.

Showing Households on the Springboard: Worked Example

This topic describes how to show the Household item so that it’s visible from the springboard. For more information about households, see your household documentation.

Showing Households on the Springboard

1. Navigate to Application Composer, Tools, Structure.
2. Expand Sales.
3. Click Households.
4. Select Yes in the Show on Welcome Springboard drop-down list.
5. Click Save and Close.