Oracle Sales Cloud
Getting Started with Your Sales Implementation

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.

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<tr>
<th>Convention</th>
<th>Meaning</th>
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<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>
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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 customers with the concepts and procedures they need to implement a sales automation solution in a test environment. This guide explains how to implement a simple and common use case for a business that sells to other businesses. It does not explain all the different options for the default settings provided by Oracle. Nor does it provide explanations of all available features.

Note:

• If you are implementing Oracle Partner Relationship Management, then refer to the Getting Started with Oracle Partner Relationship Management guide instead of this guide.
• If you are setting up your sales applications together with another cloud service such as Oracle Global Human Resources Cloud, Oracle Procurement Cloud, and Oracle Financials Cloud, then you must implement those cloud services first according to their respective implementation guides. You must then follow a different set of steps for your initial sales setup.

How to Use This Guide

The chapters in this guide cover the setup in the recommended order. Each chapter assumes that you have completed the steps in the previous chapters. Here’s how to use this guide:

• Use the Setup Overview in each chapter as a guide to the setups you must perform. Many chapters provide brief conceptual overviews of the functionality you are setting up. The remaining topics in the chapter provide the step-by-step details of how to perform each of those setups.
• You can navigate to most of the setup tasks in this guide from an implementation project provided by Oracle that you can download from My Oracle Support.
• Refer to other guides for full explanation of the different features and options.

What Your Sales Organization Can Do After Setup

After you complete the setups in this guide, your sales organization can:

• Manage account and contact information:
  • Track your team’s interactions with account contacts.
  • Schedule meetings, calls, and demonstrations for the whole team.
• Share and collaborate on sales documents:
  • Share documents, images, and other rich media between people and groups.
  • Make it possible for everyone to annotate and discuss each document.
• Work in your integrated Google Gmail and Calendar applications:
  o Know if a sender or addressee in an e-mail you receive is already a contact, or create new contacts.
  o Share appointments and the text of important e-mails on accounts, opportunities, contacts, and leads so that the whole organization knows how you are engaging with the customer.
  o Keep important contacts and appointments synchronized between Google Contacts and Oracle Sales Cloud
• Manage opportunities:
  o Automatically assign the right salespeople to each opportunity.
  o Have your sales team manage the opportunity life cycle using a standard sales process.
  o Leverage the experience of your entire organization to help teams sell through social interactions.
• Manage the sales team:
  o Assign tasks and deadlines to ensure the work is done.
  o Provide management with reports on your team's activities.
• Forecast your revenue:
  o Your salespeople submit their forecasts that are based on criteria you choose.
  o Managers can adjust the forecasts, if necessary.
• Keep contacts informed using sales campaigns:
  o Salespeople can create e-mail campaigns to keep their contacts informed of new product launches, discounts, and events.
  o The sales campaigns automatically track responses and can generate follow-up activities.
• Import and qualify leads
  o The sales organization can follow a standard process for qualifying leads
  o You can easily set up an inside sales group to verify the information in leads before passing them on to field sales for follow-up and conversion to opportunities.
• Work on multiple devices:
  o Manage all your customer-facing information, forecasts, and other activities on mobile devices and in Microsoft Outlook.
  Setting up Outlook and mobile devices is optional. If you want, you can leave this setup for later.
• Automatically create product recommendations and leads for individual accounts based on rules that you set up in Sales Predictor. For example, if the government provides tax incentives to introduce green products into schools, then you can automatically alert your sales organization to recommend your green products to education accounts.

Prerequisites

This guide assumes that you have subscribed to Oracle Sales Cloud and have received the e-mail with your environment and initial sign-on information.
Case Study

This guide employs a case study to define the scope of the implementation tasks and illustrate their interdependence. The case study is based on a fictitious company named Vision Corp, a global high-tech company which sells laptops and multiple server product lines to businesses and other organizations. The company is introducing a product line of green servers that are energy efficient, eco-friendly, and will further help it to remain competitive in the server market.

The following figure shows the portion of Vision Corp’s organization chart that the company has decided to use for the pilot implementation.

The US Direct Sales division of Vision Corp:

- Sells to businesses and must know everything about the key customer contacts.
• Operates within one country (US) and divides its field sales organization into two regions: US Products East and US Products West. Each regional sales organization includes two salespeople, one sells laptops and the other servers.

• Includes a sales support organization that helps out with sales of technically complex server products.

• Includes a team of inside sales representatives who are tasked with verifying and qualifying leads coming from outside sources such as trade shows and web visits. After they qualify the leads, the inside sales representatives pass them on to the field sales organization for follow-up.

• Is setting up sales automation initially without any integrations with other Oracle Cloud offerings.

Related Guides

You can refer to the following guides for additional information related to your sales implementation.

Implementation Guides

The following table lists related guides used during implementation.

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<th>Description</th>
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<tr>
<td>Oracle Sales Cloud Getting Started with Partner Relationship Management</td>
<td>Describes how to set up Oracle Partner Relationship Management features to support common use cases.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Customer Data Management</td>
<td>Contains information to help implementors define the setup for managing customer information and the configuration for customer hub deployment.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Enterprise Contracts</td>
<td>Contains conceptual information and procedures needed to implement contract management features.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Incentive Compensation</td>
<td>Contains information about implementing sales compensation and payment plans.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Sales</td>
<td>Contains conceptual information and procedures needed to implement sales components and features.</td>
</tr>
<tr>
<td>Oracle Engagement Cloud Implementing Service in Engagement Cloud</td>
<td>Contains conceptual information and procedures needed to implement the service request components and features of Oracle Engagement Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Understanding File-Based Data Import and Export</td>
<td>Contains information to help those charged with exporting and importing object data.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Securing Sales</td>
<td>Contains information to help setup users and sales administrators configure access to sales functionality and data.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Security Reference</td>
<td>Lists the predefined security data that is included in the Sales offering.</td>
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User Guides
The following table lists Oracle Sales Cloud user guides.

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<th>Guide</th>
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<tr>
<td>Oracle Sales Cloud Using Campaigns</td>
<td>Contains information about creating and managing sales campaigns.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Customer Contracts</td>
<td>Contains information about creating and managing customer contracts.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Customer Data Management</td>
<td>Contains information about managing customer information and customer data quality.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Incentive Compensation</td>
<td>Contains information about administering and maintaining sales compensation and payment plans</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Partner Relationship Management for Channel Managers</td>
<td>Describes user tasks to help channel sales managers, channel account managers, and channel operations managers perform day-to-day business tasks.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Partner Relationship Management for Partners</td>
<td>Describes user tasks to help partner sales managers, partner salespeople, and partner administrators perform day-to-day business tasks.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Sales</td>
<td>Contains information about performing day-to-day sales tasks.</td>
</tr>
<tr>
<td>Oracle Engagement Cloud Using Service Request Management</td>
<td>Contains information about creating service requests and managing service request queues.</td>
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Analytics Guides
The following table lists Oracle Sales Cloud analytics and reports guides.

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<td>Oracle Sales Cloud Creating and Administering Analytics</td>
<td>Contains information about reports and analytics provided by Oracle and explains how to create your own reports, analytics, and dashboards.</td>
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Configuration Guides
The following table lists Sales Cloud configuration guides and one common cloud configuration guide.

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<tr>
<td>Oracle Sales Cloud Extending Sales</td>
<td>Describes how to create and modify objects and to configure the user interfaces and navigation menus.</td>
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### Oracle Sales Cloud Groovy Scripting Reference for Application Composer

Explains the basics of how you to use the Groovy scripting language to enhance your sales applications.

### Oracle Applications Cloud Configuring and Extending Applications

Describes the tools and concepts for configuring applications.

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## Common Applications Guides

The following table lists Oracle cloud guides for common features.

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<td>Oracle Applications Cloud Understanding Enterprise Structures</td>
<td>Explains how to use the Oracle Fusion Applications enterprise structures to meet your company’s legal and management objectives.</td>
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<tr>
<td>Oracle Applications Cloud Using Common Features</td>
<td>Provides an overview of the application functionality that is common across the applications.</td>
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<tr>
<td>Oracle Cloud Using Oracle Social Network</td>
<td>Describes implementation and user concepts for Oracle Social Network.</td>
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### Related Topics
- [Cloud Documentation on Oracle Help Center](#)
2 Entering Company Information and Getting Ready

Preliminary Tasks Overview

Before you start implementing your sales application according to the instructions in this guide, you must complete the preliminary tasks listed in the following table.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Before you sign in for the first time, complete the actions listed in the Service Administrator Action List provided by Oracle and create your account with My Oracle Support (support.oracle.com).</td>
<td>See the Signing In for the First Time topic in this chapter.</td>
</tr>
<tr>
<td>2</td>
<td>If you have not done so already, sign in and reset your temporary password by clicking your user initials at the top-right of the Welcome page and selecting Set Preferences from the menu.</td>
<td>See the How can I change or reset my password? topic in the Creating Setup Users chapter.</td>
</tr>
<tr>
<td>3</td>
<td>Enable the Sales offering for implementation.</td>
<td>See the Enabling the Sales Offering for Implementation topic in this chapter.</td>
</tr>
<tr>
<td>4</td>
<td>Enter some basic information about your company and specify your corporate currency.</td>
<td>See the Entering Your Company Information and Corporate Currency topic in this chapter.</td>
</tr>
<tr>
<td>5</td>
<td>Install into your environment an implementation project to speed up access to implementation tasks. You download the implementation project from My Oracle Support (support.oracle.com) and upload it into your environment.</td>
<td>See Enabling Quick Access to Setup Tasks Using an Implementation Project topic in this chapter.</td>
</tr>
</tbody>
</table>

Home Page Icons and What They Mean

The top of the default home page includes icons and menus you can use for navigation, search, configuration, and other tasks common across applications. Here are few you will find useful in your setup. For more information on using the common application features, see the Oracle Application Cloud Using Common Features guide.
### Entering Company Information and Getting Ready

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Icon Name or Description</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Navigator</td>
<td>Opens the Navigator.</td>
</tr>
<tr>
<td>2</td>
<td>Page Controls (The series of dots arranged horizontally in the center of the Home page.)</td>
<td>Click the dots to navigate to different pages, including the infolet page and the Quick Actions page. The infolet page summarizes key actionable information for sales users and makes it possible to drill down to individual records. The Quick Actions page provides quick access to tasks. The administrator can determine which of these pages is the Home page for users.</td>
</tr>
<tr>
<td>3</td>
<td>Global search</td>
<td>Lets you search transactional data across different objects. This field does not appear until you enable global search.</td>
</tr>
<tr>
<td>4</td>
<td>Home</td>
<td>Returns you to the page defined as the home page. By default, home is the Welcome page with the springboard.</td>
</tr>
<tr>
<td>5</td>
<td>Favorites and Recent Items</td>
<td>Marks a page as favorite and provides access to recently viewed pages.</td>
</tr>
<tr>
<td>6</td>
<td>Watchlist</td>
<td>Not used in the sales application. Watchlist enables the tracking of business objects in some applications.</td>
</tr>
<tr>
<td>7</td>
<td>Notifications</td>
<td>Accesses application notifications. Some of these are also delivered using e-mail.</td>
</tr>
<tr>
<td>8</td>
<td>User image or initials</td>
<td>Opens the Settings and Actions menu. From the menu, you can sign out, personalize and configure the UI, turn on and access help, and navigate to the Setup and Maintenance work area.</td>
</tr>
<tr>
<td>9</td>
<td>Personalize Springboard</td>
<td>Permits you to select which icons you want to appear on the Welcome page springboard. Your changes affect your springboard view only.</td>
</tr>
</tbody>
</table>
Signing In for the First Time

When your environment is ready, Oracle sends an e-mail to the person designated as the administrator when you signed up with the service. This e-mail includes the link to your service, a temporary password, and instructions on how to access the Service Administrator Action List. You must follow the instructions in the actions list before signing in.

When you sign in for the first time, reset your password by clicking your user initials at the top-right of the Welcome page and selecting Set Preferences from the Settings and Actions menu.

Related Topics

• Service Administrator Action List

Enabling the Sales Offering for Implementation

Before you start work, you must enable the Sales offering and the functional areas you are going to be implementing. You can enable only the functional areas you are implementing now and add more later, if required.

To enable the Sales offering and its functional areas for implementation, do the following:

1. While signed in as the initial user or another setup user, click the My Enterprise icon in the springboard and then click the Offerings icon.
Here’s a screenshot of a portion of the springboard after you click the My Enterprise icon.

2. Click the **Sales** offering icon in the left pane of the Offerings page.

Here’s the Offerings page showing the location of the sales icon (callout 1) and the Opt In Features button (callout 2).

3. Click **Opt In Features**.

The Opt In: Sales page appears.
4. Select the **Enable** option for **Sales**, the folder at the top of the list. Your selection enables the offering.

The following figure shows the Opt In: Sales page, highlighting the Enable check boxes (callout 1).

5. Select the **Enable** option for all the sales functional areas you are going to be using. For the tasks in the scope of this guide, enable all of the functional areas through Quotas.

6. Click **Done**.

You are returned back to the Offerings page.

7. Click **Home** in the global header to return to the springboard.

**Accessing Setup Tasks**

You perform setup tasks in the Setup and Maintenance work area and in other work areas of the application. To open the tasks you use:

- An implementation project provided by Oracle to accompany this guide
- The Sales offering Setup pages in the Setup and Maintenance work area
- The Navigator
Opening the Getting Started Setup Tasks Using an Implementation Project

To access the setup tasks covered in this guide, use an implementation project provided by Oracle. The implementation project complements the structure of the guide and provides a direct link to each core setup task. You download the implementation project from My Oracle Support and install it in your environment as described in the Enabling Quick Access to Setup Tasks Using an Implementation Project topic.

If you do not use the implementation project, then you must navigate to each individual task separately. Depending on the task, you must either open the task from the Setup page in the Setup and Maintenance work area or navigate to a different work area using the Navigator. The Setup and Maintenance work area provides access to tasks performed solely by implementors, but you must use other work areas for functional setup and testing, tasks that are eventually carried out by the sales administrator and the sales team.

Opening Setup Tasks from the Setup Page

After you enable the offering as described in the Enabling the Sales Offering for Implementation topic, you can open implementation tasks, including those not covered in this guide, from the Setup and Maintenance work area Setup page. Here is how to open tasks from this page:

1. Click the **Setup and Maintenance** icon, shown in the following figure, on the springboard.

   ![Setup and Maintenance](image)

   The Setup: Sales page appears.

   ⇐ Note: If you enabled more than one offering, you may have to select **Sales** from the list to the right of the page name. The Setup page always displays the offering that’s first in alphabetic order.

2. In the **Functional Areas** column on the Setup: Sales page, select the functional area you want to set up.

   The following table lists the callouts highlighting the different features of the Setup: Sales page on the figure which follows.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Selected functional area.</td>
</tr>
<tr>
<td>2</td>
<td>Listing of tasks associated with the functional area you selected.</td>
</tr>
</tbody>
</table>
### Callout Number | Description
--- | ---
3 | By default the page shows only the required tasks, but you can select all tasks.  
4 | You can also search for tasks in the offering using the Search Tasks field.  
5 | Quick Setup icon in the Functional Areas column leads to pages to set up key required tasks only.  
6 | Clicking the Shared link provides a listing of other offerings using the functional area.

The following figure shows the Setup: Sales page with the callouts.

![Setup: Sales page with callouts](image)

3. In the Task list, you can open tasks by clicking the task name links. By default, the list shows only the required tasks. You can display additional tasks by selecting All Tasks from the Show menu.

4. Alternatively, you can search for tasks in the offering by name using Search Tasks. Use the percent sign (%) to represent missing letters or words. For example, to find the Manage HCM Role Provisioning Rules task, you can search for manage hcm%rules. The searches aren't case-sensitive.

5. Some functional areas include Quick Setup pages which limit your setup to the minimum requirements for the functional area. When a functional area includes Quick Setup pages, the Quick Setup page icon appears, represented by a gear icon. This guide and the implementation project direct you to the Quick Setup pages wherever they are available.

See the Implementing Sales guide for more information about using the offering setup pages for setup.
Navigating to Other Work Areas for Setup

For some setup tasks and for testing your setup, you must use the Navigator to access other work areas. You can open the Navigator by clicking its icon in the toolbar.

The Navigator lists all of the application work areas that are available based on the permissions assigned to each user, rather than on the features you purchased. Because a setup user has a broad range of permissions, not all of the selections are applicable to your setup. Aside from the Setup and Maintenance work area, you use only a small number of the available work areas accessible from the Navigator menu. The most important of these include:

- **My Team**
  - **Users and Roles**
    
    Use this work area to create and edit records for individual users. The Manage Users task in Setup and Maintenance opens the same work area.

- **Tools**
  - **Scheduled Processes**
    
    Use this work area for scheduling and monitoring background processes.
  - **Application Composer**
    
    Use Application Composer to modify your application.

- **Configuration**
  - **Appearance**
    
    Lets you control application appearance, including background color and icon shape.
  - **Structure**
    
    Lets you control which items appear in the Navigator and on the Welcome page.
  - **Application Composer**
    
    Use Application Composer to modify your application.

- **Sales**

  Use the different work areas under this heading for functional setup and to create data used to test your sales application.
Here’s a screen capture of a typical Navigator menu displaying more tasks than you will use in your implementation. You can configure the Navigator later to show only the tasks that you need.

Enabling Quick Access to Setup Tasks Using an Implementation Project

Video

Watch: This tutorial shows you how to speed up your initial sales setup using an implementation project supplied by Oracle. The implementation project serves as a launch pad for setup tasks, so you don’t have to search for individual tasks or navigate to work areas, including scheduled processes. The content of this video is also covered in text topics.

Downloading the Implementation Project to Your Desktop

Download the implementation project to your desktop from Oracle Sales Cloud: Getting Started with Your Implementation: Implementation Project (Doc ID 2252175.1) available on support.oracle.com.
There are two variations of the implementation project that you download depending on how much functionality you want to set up:

- **Quick Setup Core Sales**: Use this implementation project for setting up account, contact, and opportunity management only.
- **Quick Setup Sales**: Use this implementation project to set up sales quotas and sales forecasting in addition to the core features.

The Getting Started with Your Oracle Sales Cloud Implementation guide (this guide) covers the tasks in both variations.

### Installing the Implementation Project You Downloaded

Install the implementation project by uploading the configuration package file using these steps:

1. Navigate to the Setup and Maintenance work area.
2. Click the **Tasks** panel tab icon (highlighted in the following screenshot).

![Tasks panel tab](image)

The panel tab opens and displays the tasks available to you.

Here’s a screenshot of the open Tasks panel tab.
3. Click the Manage Configuration Packages task link in the panel tab.

The Manage Configuration Packages page appears.

4. Click Upload.

The Upload Configuration Package page appears.

5. Click Choose File and select the compressed file with the implementation project you downloaded.

6. Click Get Details.

7. Click Submit.

The application displays a message that the import is successful and the implementation project was created.

8. Click OK to close the message window.

9. Click Done on the Manage Configuration Packages page.

You are returned to the Setup and Maintenance work area page.

10. Click the Tasks panel tab icon again and click Manage Implementation Projects.

The Implementation Projects page appears listing your project.

11. Click the name link to open the implementation project.

Using the Implementation Project as a Launchpad for Your Tasks

Follow these steps to use the implementation project as the launchpad for your implementation tasks.

1. Navigate to the Setup and Maintenance work area by clicking on its icon on the springboard.

The Setup and Maintenance page appears.
2. Click the **Tasks** panel tab icon highlighted in the following figure.

![Tasks panel tab](image)

The panel tab opens and displays the tasks available to you.

3. Click **Manage Implementation Projects**.

The Implementation Projects page appears listing your project.

4. Click the name link for the project.

The implementation project displays the folders containing the individual tasks in the Task Lists and Tasks region.
The following figure includes a screen capture of the Quick Setup Sales implementation project highlighting the Go to Task icon.

5. Click on a folder to open it and click the **Go to Task** icon for a task. This icon is highlighted in the preceding figure. When you complete a task, you are returned back to the project.

**Note:** Some of the optional tasks covered in the last chapters of this guide, including product recommendations and mobile access, are not accessible from the implementation project. You must access these tasks as indicated in the guide.

### Entering Your Company Information and Corporate Currency

If you are setting up your sales application on its own as described in this guide, then follow this procedure to enter basic information about your company and specify your corporate currency. If you are setting up your sales applications together
with another cloud service such as Oracle Global Human Resources Cloud, Oracle Procurement Cloud, and Oracle Financials Cloud, then you may be required to enter more information about your enterprise structures according to the instructions provided in their respective implementation guides.

Completing this procedure accomplishes the following:

- Creates a rudimentary enterprise structure required for internal application purposes only.

  The enterprise structure is not visible to sales organization users or their customers.

- Creates a set of automatic role-provisioning rules that provision users with the required security roles.

To enter your company information and corporate currency:

1. Sign in.
2. Open the **Create Company Information** task directly from the implementation project you installed as described in the Enabling Quick Access to Setup Tasks Using an Implementation Project topic. The implementation project provides links to the set of setup tasks covered in this guide.

   Alternatively, you can open the task from the Setup: Sales page by clicking the **Quick Setup** icon for the Company Profile functional area (the gears icon highlighted by callout 1 in the following figure). If any changes are required after your initial setup, you can open the appropriate tasks on the right side of the page (callout 2).

   The following figure shows a screen capture of the Setup: Sales page.

   ![Setup: Sales page screenshot](image)

   The Create Company Information page appears.

3. Enter your company name in the **Enterprise Name** field.
4. Enter the country where your company is located.
5. Enter your company street address. Do not enter city or state and other information.
6. The first and last name fields list the names of the user who signed into the application. You can edit the entries.
7. When you are satisfied that the information is correct, click **Submit**.
The application runs a background process to create the enterprise structure and create the role-provisioning rules.

8. Optionally, click **Refresh** to monitor the progress of the process.

When the process completes, the Review Company Information page appears. The page displays both the information that you entered and the information that the process created for you. You cannot edit any of the fields except Corporate Currency. The following table list and describes the fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise Name</td>
<td>The name you entered.</td>
</tr>
<tr>
<td>Address</td>
<td>The street address you entered.</td>
</tr>
<tr>
<td>Legal Entity</td>
<td>The enterprise name followed by the letters LE.</td>
</tr>
<tr>
<td>Business Unit</td>
<td>The enterprise name followed by the letters LE BU.</td>
</tr>
<tr>
<td>Initial User</td>
<td>Name of the user who is signed in.</td>
</tr>
<tr>
<td>Corporate Currency</td>
<td>By default, the corporate currency is US Dollar. Select a different corporate currency, if required.</td>
</tr>
</tbody>
</table>

The following figure shows a screen capture of the page. The callout highlights the location of the Corporate Currency field.

9. If your company uses a different currency than the US Dollar for your sales transactions, then select the currency from the **Corporate Currency** list (highlighted by callout 1 in the preceding figure).

10. Jot down the **Legal Entity** and **Business Unit** names. You must enter these names when importing users.

11. Click **Save and Close**.
Options for Importing Your Sales Data

There are four different ways to import your sales application data in a file and two types of public web services you can use to import data directly from an external application. When you are importing data for a particular object, you must make sure that any prerequisite objects already exist in the application. For example, if you are importing contacts for an account, then the account must already exist in the application. If one import job depends on the contents of another import job, then the prerequisite job must be successfully completed before you start the dependent job. For example, if you are importing both accounts and opportunities, then you must ensure that accounts are imported successfully before you import opportunities. Which import method you use depends on the type of data you are importing, the volume of data, and technical requirements. If you are integrating your sales application with other cloud services, then you may be required to use additional import methods as described in the appropriate guides.

The following table provides a brief overview of the import methods and provides references to further information.

<table>
<thead>
<tr>
<th>Import Method</th>
<th>Description</th>
<th>When to Use</th>
<th>How to Access</th>
<th>For More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quick Import Excel Macros</td>
<td>The import macros are designed to speed up and simplify the import of up to 5000 records at a time for some objects. The macros help you by validating your data entries, providing lists of values, and automatically populating constant values. The macros create data files that are automatically imported using File Import. The import macros are available for importing the following objects: • Sales Users • Products and product groups • Accounts • Contacts • Account Hierarchy • Leads • Opportunities</td>
<td>The import macros are the recommended method for importing data in your initial deployment. The macros are targeted to the simple proof of concept sales automation use case covered in the Getting Started with Your Sales Implementation guide (this guide). For example, the import macros assume that you are importing account, contact, and lead records for one country at a time. The macros generate log files with the data used for File Import, so they can also serve as a learning tool for more complex import.</td>
<td>You can download the Excel macros and any required mapping files from the Getting Started with Your Implementation: Quick Import Macros (Document ID 2228503.1) article on My Oracle Support.</td>
<td>The different chapters in the Getting Started with Your Sales Implementation guide (this guide) provide detailed instructions and video tutorials for using the macros. For instructions on how to add your own fields to the macros, see How Customize Quick Import Macro for importing Employee Resources (Doc ID 2364229.1) article on My Oracle Support.</td>
</tr>
<tr>
<td>Import Management</td>
<td>Improves definition, error handling, and performance for importing flat files (.csv). For example, Import Management has drag and drop mapping capabilities and validates</td>
<td>Use this type of import for the available objects. You must use File Import for the rest.</td>
<td>Click on Import Management in the Navigator.</td>
<td>See the Understanding Import and Export Management guide for instructions on using the import. The File-Based Data Import for Oracle Sales</td>
</tr>
<tr>
<td>Import Method</td>
<td>Description</td>
<td>When to Use</td>
<td>How to Access</td>
<td>For More Information</td>
</tr>
<tr>
<td>-----------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>File Import</td>
<td>Supports the import of data files with up to 100,000 records each for the</td>
<td>Use File Import to import data outside the scope of the Getting Started with</td>
<td>File Import tasks are available in the Setup and Maintenance work area in the</td>
<td>Cloud guide provides information on the import attributes, including valid values</td>
</tr>
<tr>
<td></td>
<td>broadest range of sales objects, including custom objects.</td>
<td>Your Guide (this guide) and the Quick Import Excel Macros.</td>
<td>Data Import and Export functional area for the Sales offering.</td>
<td>and validations.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>External Data Loader</td>
<td>Command-line tool that is used to import high-volume flat source data files.</td>
<td>Use this import method for importing very large data files for the objects</td>
<td>You can download the client from Oracle Support Document 2325249.1 (External Data</td>
<td>Instructions for using the client are available in the document and in the client</td>
</tr>
<tr>
<td>Client</td>
<td>This tool automatically splits a large data file into multiple smaller files</td>
<td>supported by Import Management.</td>
<td>Loader Client) on My Oracle Support.</td>
<td>itself.</td>
</tr>
<tr>
<td></td>
<td>to adhere to the application’s import volume limits, and enables the tracking</td>
<td></td>
<td></td>
<td>For REST API documentation, see the REST API for Oracle Sales Cloud guide.</td>
</tr>
<tr>
<td></td>
<td>of import status.</td>
<td></td>
<td></td>
<td>The File-Based Data Import for Oracle Sales Cloud guide provides information on</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>the import attributes, including valid values and validations.</td>
</tr>
<tr>
<td>Web Services</td>
<td>Web services are available for external client applications to initiate and</td>
<td>Use web services to manage import jobs if you need to import directly from an</td>
<td>Public APIs are available for both the Import Management/REST</td>
<td>For REST API documentation, see the REST API for Oracle Sales Cloud guide.</td>
</tr>
<tr>
<td></td>
<td>monitor import jobs. Import</td>
<td>external application.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Import Management is available for importing data for the following application objects:

- Accounts
- Activities
- Assets
- Attachments
- Contacts
- Leads
- Opportunities
- Any additional objects you create
<table>
<thead>
<tr>
<th>Import Method</th>
<th>Description</th>
<th>When to Use</th>
<th>How to Access</th>
<th>For More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Import</td>
<td>Management jobs can be managed with REST web services, and File Import jobs can be managed with SOAP web services.</td>
<td></td>
<td>services and the File Import/SOAP services.</td>
<td>For SOAP API documentation, see the SOAP Web Services for Oracle Sales guide.</td>
</tr>
<tr>
<td>Quick Import</td>
<td></td>
<td></td>
<td>The REST services include the following:</td>
<td>The File-Based Data Import for Oracle Sales Cloud guide provides information on the import attributes, including valid values and validations.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Import Activities</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Import Activity Maps</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>• Import Export Objects Metadata</td>
<td></td>
</tr>
<tr>
<td>EDLC</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The following figure provides an architectural overview of the different import methods:

- Both File Import (callout 1) and the Quick Import (callout 2) use the same SOA architecture to import data. When you import data using the quick import Excel macros, you are creating an import activity in File Import using SOAP web services. The macro import creates the same import activity and uses the same mapping as you do when you initiate the import from the application. You can monitor each import in the macro or in the application itself.

- Both Import Management (callout 3) and the External Data Loader Client (callout 4) use the same Oracle Enterprise Scheduler processes for import. When you import very large files using the client, the REST APIs create multiple processes to respect the Import Management file size limit.

- If you need to import from an external application, then you can use the SOAP and REST and web services directly (callouts 5 and 6).

![Diagram](image)

Related Topics

- Understanding File-Based Data Import and Export guide
• Understanding Import and Export Management guide
• REST API for Oracle Sales Cloud guide
• SOAP Web Services for Oracle Sales guide

Speeding Up Import Using Excel Macros Provided by Oracle

The import topics in this guide explain how to import your data for key sales objects using Microsoft Excel macros provided by Oracle. The import macros are designed to speed up and simplify the import of up to 5000 records at a time for some objects. The macros help you by validating your data entries, providing lists of values, and automatically populating constant values. After you enter your data, you click a button in the macro to import. The macros automatically create an import activity for you and permit you to monitor the progress of the import activity from within the macro itself. The import macros are targeted to the simple sales automation use case covered in the guide. They can also serve as a learning tool for more complex import.

The import macros are available for importing the following objects:

• Sales Users
• Products and product groups
• Accounts
• Contacts
• Account Hierarchy
• Leads
• Opportunities

Oracle also provides the mappings you need to import your data from the macros. When you import, the mappings tell the application which column in your data file maps to which application attribute. The macros either use the existing default mapping in the application or provide a mapping file you must upload into your application before importing.

You can download the Excel macros and any required mapping files from the Getting Started with Your Implementation: Quick Import Macros (Document ID 2229503.1) article on My Oracle Support.

Note: You can modify the macros to import additional standard fields and customer-defined fields. If you add additional columns to the macro, then you must also modify the existing import mappings. The steps for modifying the macros and mappings are not covered in this guide.
3 Setting Up User Account Preferences

Setup Overview

Before you create your first users, you must initialize the Security Console and then use it to review the default preferences the application uses, including user name format and password strength. You can also create your own e-mail notifications users receive regarding their accounts. Oracle provides sample notifications, but they include Oracle-specific language. Use the Security Console only for the tasks described in this chapter. Some features are more advanced or do not apply to the sales application. See the About Using the Security Console in Your Initial Sales Setup topic in this chapter for details.

The following table lists and describes the tasks covered in this chapter. You can open these tasks from the implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Initialize the Security Console work area.</td>
<td>Import Users and Roles into Application Security</td>
<td>See the Initializing the Security Console topic in this chapter.</td>
</tr>
<tr>
<td>2</td>
<td>Setup preferences for user name format, passwords, and notifications in the Security Console.</td>
<td>Security Console</td>
<td>See the Setting Up Preferences for User Names, Passwords, and Notifications topic in this chapter.</td>
</tr>
</tbody>
</table>

About Using the Security Console in Your Initial Sales Setup

For setting up sales, use the Security Console work area only for the tasks recommended in this guide. You must create users using the procedures described in this guide rather than using the Security Console. For information about more advanced tasks, including security configuration, see the Securing Sales and Extending Sales guides.

Here is a list of the Security Console tabs and what you can use them for. Only setup users, or other users with the IT Security Manager job role, can access the Security Console.

<table>
<thead>
<tr>
<th>Tab</th>
<th>How to Use It</th>
</tr>
</thead>
<tbody>
<tr>
<td>Roles</td>
<td>Used for creating your own roles as described in Securing Sales guide.</td>
</tr>
<tr>
<td>Users</td>
<td>Used to manage user passwords and to update user e-mail addresses. Do not use this tab to create users or to provision job roles. For sales, you must follow the instructions in the rest of this guide to create users, provision job roles, and change user names. Note that all users, even members of the sales organization who cannot access the Security Console, can reset their own passwords by clicking the user name in the welcome page and selecting the Preferences option from the Settings and Actions menu.</td>
</tr>
<tr>
<td>Analytics</td>
<td>Makes it possible for you to review role assignments and compare roles. This advanced security functionality is covered in the Securing Sales guide.</td>
</tr>
</tbody>
</table>
## Initializing the Security Console

The initial user must initialize the Security Console before using it for the first time by running the process Import Users and Roles into Application Security task. The process copies users, roles, privileges, and data security policies from the LDAP directory, policy store, and Applications Core Grants schema to Oracle Fusion Applications Security tables. Having this information in the Oracle Fusion Applications Security tables makes the assisted search feature of the Security Console fast and reliable. After the process runs to completion for the first time, Oracle recommends that you schedule the process to run daily.

1. Open the **Import Users and Roles into Application Security** task from the Set Up Security Console and Preferences folder in the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.

2. On the Import Users and Roles into Application Security page, click **Submit**.

   This action starts the Import User and Role Application Security Data process. After the process completes, you can use the Security Console.

3. Now set up this same process to run daily:
   
   a. On the Import Users and Roles into Application Security page, click **Advanced**.
   
   b. Click the **Schedule** tab.
   
   c. Select the Using a schedule option.
   
   d. From the Frequency list, select **Daily**.
   
   e. Enter an end date far in the future.
   
   f. Click **Submit**.

## Setting Up Preferences for User Names, Passwords, and Notifications

<table>
<thead>
<tr>
<th>Tab</th>
<th>How to Use It</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certificates</td>
<td>The sales application does not use this functionality.</td>
</tr>
<tr>
<td>User Categories</td>
<td>Used to specify password policies and to manage notifications users receive about their accounts and passwords. You can specify different behavior for different categories of users. For the sales application, all the users you create are initially assigned to the Default category. But you can create additional user categories and move users to them.</td>
</tr>
<tr>
<td>Administration</td>
<td>Used for role copying preferences and other advanced features covered in the Securing Sales guide.</td>
</tr>
</tbody>
</table>
Video

Watch: Learn how to set user name, password, and account notification preferences for creating users. The content of this video is also covered in text topics.

Procedures

Use the Security Console to set your preferences for user names passwords and user notifications. For example, you can require users to set stronger passwords, implement shorter user names, change the text of the notifications your users receive, or turn notifications off completely.

Specifying Preferences for User Names and Passwords

2. Click User Categories.
   
   The User Categories tab makes it possible for you to set up different preferences and notifications for different categories of users. Since all of the users you create and import in the sales application are created in the Default category, you set preferences for that category only.
3. Click DEFAULT.
   
   The DEFAULT User Category: Details page appears. Here you can set the user name format.
4. Click Edit.
5. Select the user name format you want to use from the User Name Generation Rule list.
   
   The application uses your selection to generate user names if you don’t enter them manually or import them from a file. By default, the application uses the email address as the user name.
   
   If you are implementing Partner Relationship Management, then you must use email for creating partner contacts. Otherwise, you can use any of the three following options:
   
   - First name.last name
   - Email
   - First initial and last name
   
   Do not use Person or party number because numbers are not easily remembered by users. For example, if the person number generated by the application for John Smith is 10000000178803, then the user name is 10000000178803 as well.
6. Selecting the Generate system user name when generation rule fails option ensures the application generates a user name even if there is no information available for the option you selected.
7. Click Save and Close.
8. Click the Password Policy subtab.
9. Here you can specify password strength and expiration. For example, you can require users to use special characters in passwords in addition to capital letters and numbers and specify how frequently passwords must be changed.
10. Selecting the **Administrator Can Manually Reset Password** option, makes it possible for administrators to manually create new passwords for users.

11. Click **Save and Close**.

**Configuring Email Notifications to Users**

In the Notifications subtab on the **DEFAULT User Category** tab, you can specify which email notifications, if any, are sent to users and the text of those notifications. At present, the application supports text-only notifications in one language.

You can:

- Turn all notifications on or off.
  - By default, all notifications are turned on. If you are setting up a test environment, turn off notifications while creating sales users to prevent the users from signing in to the application while you are setting it up.
- Turn individual notifications on or off.
  - By default, all individual notifications are turned on.
- Create your own notifications.
  - Oracle provides predefined English-language templates with Oracle-specific language. You can create your own templates.

To configure the email notifications for the **DEFAULT User Category**:

1. Click the **Notifications** subtab.
   - The subtab lists the default notification templates provided by Oracle. The list includes the events that trigger the notifications and the email subject lines.
2. To make changes, click **Edit**.
3. If you want to turn off all notifications, then deselect the **Enable Notifications** option under the **Notification Preferences** heading.
4. If you want to turn off individual notifications, then:
   a. Click the template name link.
   b. Deselect the **Enabled** check box.
   c. Click **Save and Close**.
5. If you want to create your own notification templates, then do the following:
   a. Click **Add Template** and select the event.
      - Selecting the event automatically copies over the text provided in the corresponding Oracle template which you can then edit.
   b. Edit the notification subject line and text.

The following table lists the tokens you can include in the message text. Each token must be within curly brackets and preceded by a dollar sign, for example: ${firstName}.

<table>
<thead>
<tr>
<th>Token</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>notificationUserName</td>
<td>User name to which notifications are sent</td>
</tr>
<tr>
<td>userEmailAddress</td>
<td>Address to which email notifications are sent</td>
</tr>
</tbody>
</table>
## Setting the Synchronization Process Frequency Warning

Whenever you navigate to the Security Console, you get a warning if the Import User and Role Application Security Data process was not run in the last six hours. You can change the frequency of the warning by setting the **Hours Since Last Synchronization Job Run Warning** option. If you schedule the process to run daily, then you may want to increment this option to a value greater than 24.

1. Click the **Administration** subtab.
2. Change the value for the **Hours Since Last Synchronization Job Run Warning**.

### Related Topics
- Managing User-Name and Password Notifications
4 Creating Setup Users

Setup Overview

As the initial user created by Oracle, you can perform security tasks, such as creating other users and granting setup permissions. Your next step is to create any other users you need to help you with the setup and to grant yourself the additional setup permissions you need to complete the setup tasks covered by this guide.

Read the About Creating Setup Users topic and then perform the setups in this table. The tasks listed are in the Create Setup Users folder in your implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create other setup users.</td>
<td>Manage Users</td>
<td>See the Creating Setup Users topic in this chapter.</td>
</tr>
<tr>
<td>2</td>
<td>Grant the initial user the same additional permissions as the other users.</td>
<td>Manage Users</td>
<td>See Granting the Initial User the Same Permissions as Other Setup Users topic in this chapter.</td>
</tr>
<tr>
<td>3</td>
<td>Any setup users you create should receive an email with a link they can use to reset their passwords and sign in. If they don't receive the email for some reason, you can reset user passwords and update email addresses in the Security Console.</td>
<td>Manage Applications Security Preferences</td>
<td>See the topics in the Resetting User Passwords and Updating Email Addresses section.</td>
</tr>
<tr>
<td>4</td>
<td>By default, setup users can only see the scheduled processes they themselves submit. You can use the Security Console to provide all of the setup users the ability to see what processes are running and their status, no matter who submitted them.</td>
<td>Manage Applications Security Preferences</td>
<td>See the Giving Users the Permission to View All Scheduled Processes in this chapter.</td>
</tr>
</tbody>
</table>

About Creating Setup Users

Provisioning the security permissions users need to complete the setup tasks in this guide is as easy as making a couple of entries and clicking save. Provisioning rules provided by Oracle do the rest. This topic provides a brief overview of Oracle's security model, lists the permissions setup users need, and explains how the provisioning process works.
How Permissions Are Grouped and Provisioned

Oracle uses the Role Based Access Control (RBAC) security industry standard. The permissions are grouped in:

- Job roles, which correspond to the jobs that the person is doing in your organization
- Abstract roles, which permit users to carry out tasks that are common to all employees or resources

You typically provision sales application users with the job roles corresponding to the roles they play in the sales organization (their resource roles), as well as the employee and resource abstract roles. The job roles make it possible for users to perform the duties specific to their jobs. The employee abstract role provides access to reports and personal profile information. Without the resource abstract role, users can’t participate in the sales process, create accounts and opportunities, or be assigned to sales teams. You can find the description of each job and abstract role Oracle provides and all the duties that come with it in the Oracle Sales Cloud Security Reference guide.

The application provisions job roles and abstract roles to users using role-provisioning rules. Each role-provisioning rule is made up of the rule conditions and the names of the job roles and abstract roles that are assigned to the user if the conditions are met. In the sales application, the job role and the resource abstract role are assigned to a user based on the resource role. The employee abstract role is provisioned to users of type employee.

Oracle provides you with the role-provisioning rules required to automatically provision users if you entered your company information according to the steps outlined in this guide (Entering Your Company Information and Corporate Currency topic). If you set up the company information in a different way, for example, if you’re setting up the application together with Oracle HCM Cloud or another cloud service, then you must create all the role provisioning rules yourself. You must also create rules for any additional resource roles you create. The role-provisioning rules are discussed in more detail in the Getting Ready to Create Sales Users chapter and in the Securing Sales guide.

Security Roles Required by Setup Users

To complete the setup tasks in this guide, users must be provisioned with the security rules listed in the following table. The initial user provided by Oracle is already provisioned with the first three. While the initial user can create other users and perform many setup tasks, the initial user can’t complete all the tasks without the additional security roles.

<table>
<thead>
<tr>
<th>Role</th>
<th>Type</th>
<th>Permissions the Role Provides</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Implementation Consultant</td>
<td>Job Role</td>
<td>Access all setup tasks across all products</td>
</tr>
<tr>
<td>IT Security Manager</td>
<td>Job Role</td>
<td>Access security tasks, including the ability to assign other security roles</td>
</tr>
<tr>
<td>Application Diagnostics Administrator</td>
<td>Job Role</td>
<td>Access diagnostic tests and data</td>
</tr>
<tr>
<td>Employee</td>
<td>Abstract Role</td>
<td>Access BI reports and run and monitor background processes</td>
</tr>
<tr>
<td>Sales Analyst</td>
<td>Job Role</td>
<td>Create Sales Predictor rules</td>
</tr>
<tr>
<td>Sales Administrator</td>
<td>Job Role</td>
<td>Perform the sales administrator duties</td>
</tr>
</tbody>
</table>
How You Create and Provision Setup Users

To provision the required security roles, all you have to do is to create setup users as users of type employee and assign them the Sales Setup User resource role. It doesn’t matter whether the user you are setting up is an actual employee or not. Two rules provided by Oracle do the rest:

- The Employee rule automatically assigns the Employee abstract role to all users of type Employee.
- The Sales Setup User rule automatically assigns all users with the Sales Setup User resource role (the condition), with all of the required job roles.

The following graphic illustrates the process:
The setup users you create aren’t assigned the Resource abstract role, so they can’t participate in the sales process, but there is nothing stopping you from creating other provisioning rules to provision sales administrators or others with the same setup permissions.

Creating Setup Users

Video

Watch: Learn how to create setup users and automatically provision them with the setup job and abstract roles they need. The content of this video is also covered in related procedures.

Procedure

Follow this procedure to create users who can perform the sales setup discussed in this guide:

1. Open the Manage Users task from the implementation project or click Navigator > My Team > Users and Roles.
2. On the Search Person page, click Create.
3. On the Create User page, in the Personal Details region, enter the user’s name and a unique email address.
   The application automatically sends user notifications to this email address unless you disable notifications in the Security Console.
4. In the User Details region, you can enter a user name.
   If you leave the User Name field blank, then the application automatically creates a user name for you. By default, the application uses the email as the user name. You can change the default format using the Security Console.
5. To send an email notification with the link to create a password and sign in for the first time, select the Send user name and password option in the User Notification Preferences region.
   The application sends the email notification immediately after you save the user record for the first time. This option is available only before you save. After you save the record, you must instead use the Users tab in the Security Console to reset the password and send the notification.

   Note: If this option isn’t available for selection, notifications may be disabled. Check the Notification settings in the Security Console. See the Setting Up Preferences for User Names, Passwords, and Notifications section of the Setting Up User Account Preferences chapter for more details.

6. Select these values in the Employment Information region:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value to Select</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Person Type</td>
<td>Employee</td>
<td>For setup only. The user need not be an employee.</td>
</tr>
<tr>
<td>Legal Employer</td>
<td>Your company name followed by the letters LE</td>
<td>The legal employer name is used for setup only, so doesn’t have to correspond to any actual entity.</td>
</tr>
</tbody>
</table>
### Creating Setup Users

<table>
<thead>
<tr>
<th>Field</th>
<th>Value to Select</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Unit</td>
<td>Your company name followed by the letters LE BU</td>
<td>The business unit name, like the legal employer name, is used for setup only.</td>
</tr>
</tbody>
</table>

7. In the Resource Information Region, select **Sales Setup User** from the **Resource Role** list.

8. Click **Autoprovision Roles**.

   The **Role Requests** region displays the following roles:
   - Application Diagnostics Administrator
   - Application Implementation Consultant
   - IT Security Manager
   - Employee
   - Sales Analyst
   - Sales Administrator

   The role request process may take a few minutes to complete because it’s set to run periodically. You can view the status of the request any time you edit the user.

9. Click **Save and Close**.

   If you selected the **Send user name and password** option and notifications are enabled, then the application automatically sends the email with the initial sign-in link to the email address you provided for the user. If you didn’t select this option, then you must reset the password using the procedure described in the **Resetting User Passwords** topic. After you create the user, you can no longer update the email address in this UI. You can instead update the email address on the **Users** tab in the Security Console.

---

**Granting the Initial User the Same Permissions as Other Setup Users**

The initial user and other setup users can use this procedure to grant the initial user the same permissions as the other setup users.

1. Open the **Manage Users** task from the implementation project or click **Navigator > My Team > Users and Roles**.
2. On the Search Person page, enter the first name of the initial user in the **Keywords** field and click **Search** (the right-arrow icon).
3. Select the name link in the Search Results.
4. On the Edit User page, in the **Resource Information** region, select **Sales Setup User** from the **Resource Role** list.
5. Click **Autoprovision Roles**.

   The **Role Requests** region displays the following roles:
   - Sales Analyst
   - Employee
Sales Administrator

Your role request process may take a few minutes to complete because it’s set to run periodically. You can view the status of the request any time you edit this user.

6. Click **Save and Close**.

If you’re signed in as the initial user, you must sign out and then sign in again for the new permissions to take effect.

## Resetting User Passwords and Updating Email Addresses

### Resetting User Passwords

Setup users, who are provisioned with the IT Security Manager job role, can use the Users tab in the Security Console work area to reset passwords for all application users.

Note: Users who can’t access the Security Console can only reset their own passwords by clicking the **Set Preferences** link in the **Settings and Actions** menu (available by clicking your user name) or by using **Forgot Password** on the sign-in page.

To reset a user’s password in the Security Console:

1. Open the **Manage Applications Security Preferences** task from the implementation project. Alternatively, you can search for this task by name in the Setup and Maintenance work area or use the Navigator.
2. You can ignore and close any warnings regarding the scheduling of the Import Users and Roles Application Security Data job.
3. Click the **Users** tab.
4. Search for the user using one of the following:
   - First or last name, but not both
   - User name

Here’s a screenshot of the Users tab. Callout 1 highlights the location of the Action menu.
5. From the Action menu, select Reset Password. The Reset Password window appears, shown in the following screenshot. The window displays the password strength policy.

![Reset Password Window]

6. Select the Automatically generate password option to send an email to users with a link they can use to create their own passwords.

7. To reset the password yourself, do the following:
   a. Select the Manually change the password option.
   b. Enter the new password twice.

   **Note:** The manual option is available only if you selected the Administrator can manually reset password option while editing the password policy for the DEFAULT user category in the Security Console. See the Setting Preferences for User Names, Passwords, and Notifications topic for details.

8. Click Reset Password.

**Related Topics**
- Setting Preferences for User Names, Passwords, and Notifications

**Changing a User's Email Address**

Use the Users tab in the Security Console work area to change user email addresses. If you're updating the email addresses of sales users, then you can also use the same import process you use to create them.

1. Navigate to the Security Console.
2. Click the Users tab.
3. Search for the user using one of the following:
   a. First or last name, but not both
   b. User name
4. Click the user name link.
5. On the User Account Details window, click Edit.
6. In the Edit User Account window, edit the email address.

   **Note:** Don't edit any of the other information available on the Edit User Account page. Use the Manage Users task instead.
7. Click **Save and Close**.

How can I change or reset my password?

Use the Preferences page to change your password.

In the global header, click your user image or name and select **Set Preferences** in the Settings and Actions menu. In the General Preferences section, click **Password**.

Giving Users the Permission to View All Scheduled Processes

Your application setup requires you to run numerous scheduled processes and ensure they complete successfully. By default, users can only see the scheduled processes they themselves submit. By creating a custom role in the Security Console and assigning all of the setup users to it, you ensure that everyone can see what processes are running and their status, no matter who submitted them.

1. Open the **Security Console**.
2. Click the **Roles** tab.
3. On the Roles tab, click **Create Role**.

The Create Role page displays a series of steps you can click directly or reach using the **Next** button.

4. In the Create Role: Basic Information step, make the following entries:

<table>
<thead>
<tr>
<th>Field</th>
<th>Suggested Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Name</td>
<td>Monitor ESS Processes</td>
</tr>
<tr>
<td>Role Code</td>
<td>MonitorESSProcesses</td>
</tr>
<tr>
<td>Role Category</td>
<td>Common - AbstractRoles</td>
</tr>
</tbody>
</table>

Description
### Field

<table>
<thead>
<tr>
<th>Field</th>
<th>Suggested Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Role Code</td>
<td>MonitorESSProcesses</td>
</tr>
<tr>
<td>Role Category</td>
<td>Common - Abstract Roles</td>
</tr>
</tbody>
</table>

5. Click the **Role Hierarchy** step (callout 1 in the following screenshot).

![](image)

6. Click **Add Role** (callout 2).

7. In the Add Role Membership window, search for **ESS Monitor Role** and click **Add Role Membership**.

8. Click the **Users** step.

9. Click **Add User** and add all of the setup users by searching for each by name and clicking **Add User to Role**.

10. Click **Cancel** when you are done.

The Users step should list all of the users you added.

11. Click **Next** to get to the **Summary and Impact Report** step.

12. Click **Save and Close**.

The users you added to the role can now monitor all of the scheduled processes in the **Schedule Processes** work area.
5 Setting Up the Accounting Calendar

Setup Overview

You must set up the accounting calendar that is used for forecasting using the steps outlined in the following table. The table provides a description of each task, the task name, and refers you to related topics where you can find detailed procedures. You can open all setup tasks from the Set Up Accounting Calendar folder in your implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create the calendar and generate the periods for past and future years. For your sales implementation, you can create only one calendar.</td>
<td>Manage Accounting Calendars</td>
<td>See the Creating the Accounting Calendar topic in this chapter.</td>
</tr>
<tr>
<td>2</td>
<td>Designate the calendar you just created as the calendar you intend to use by setting the Accounting Calendar Default profile option.</td>
<td>Manage Calendar Profile Option</td>
<td>See the Enabling the Accounting Calendar You Created topic in this chapter.</td>
</tr>
<tr>
<td>3</td>
<td>Enable the time periods you generated for analytics and reports by running the process Refresh Denormalized Time Dimension Table for BI. You can run this process directly from the implementation project or from the Scheduled Processes work area.</td>
<td>Refresh Denormalized Time Dimension Table for BI</td>
<td>See the Enabling the Time Periods You Generated for Analytics and Reports topic in this chapter.</td>
</tr>
</tbody>
</table>

About Setting Up the Accounting Calendar

The accounting calendar defines the start and end of your fiscal year and the time periods in that calendar, including the exact dates for each period. Your sales applications use these defined periods, often called enterprise periods, for multiple purposes. Examples include:

- Reports that provide amounts by enterprise period, such as a sales pipeline analysis
- Metrics calculations by period for territory analysis
- The ability to adjust forecast amounts by time period
- Distribution of quota amounts by time period

The period frequency set in your fiscal calendar is the shortest period you can use. Therefore, if you set the period frequency to yearly, then you can create reports and activities for the year, but cannot break them down by month. If you set the period frequency to monthly, then you can break down activities and reports by month and summarize by quarter and year.
However, if you set the period frequency to weekly, then you can perform activities and reports by week, quarter, and year, but not by month because the number of weeks varies by month.

Creating the Accounting Calendar

Use this procedure to create the accounting calendar used in reporting and forecasting.

To create the accounting calendar:

1. While signed in as a setup user, open the task **Manage Accounting Calendars** from the implementation project or after searching for the task by name in the Setup and Maintenance work area.
2. On the Manage Accounting Calendars page, click **Create**.
3. Name your calendar, for example, **Sales Calendar**.
4. Leave the **Adjusting Period Frequency** set to **None**.
5. Enter a start date of January 1 for a year that is at least two years prior to the date of any historical data that you plan to use.

   You cannot change this entry after you start using the application, so consider using the year your company was created. Vision Corp. is using 1/1/10.

6. For **Period Frequency**, select the shortest time period you want to use for reports and activities.

   Vision Corp. selects **Monthly**. The period starts on the first of the month and ends on the last day of the month, regardless of the number of days or weeks in each month. Another choice, for example, is where the first two months consist of 4 weeks, and the third month contains 5 weeks.

7. Your entries in the Period Name Format region determine how the period names appear in the UI. The **First Period** field provides a preview of your name format. You can:
   - Enter a prefix to the period
   - Select a separator
   - Select the format

   Vision Corp. selects **None** as the **Separator** and selects **MMMYY calendar year** for the **Format**.

8. Click **Next**.

   The application generates the periods, with start and end dates, for the first year (2010 for Vision Corp.) and displays them on the Create Accounting Calendar: Period Details page.
The following figure shows a screen capture of the page with periods generated for the Vision Corp. use case. Each generated period represents one month in the year. It starts on the first day of the month and ends on the last day of the month.

9. If needed, you can manually change the details for each period.

Note: The start date of the first period for the year defines the start of the fiscal year. The end date of the last period for the year defines the end of the fiscal year.

10. Click Save and Close.

11. Now generate the calendar periods for all the past and future years. You must generate enough years into the future to permit forecasting. Oracle recommends that you create periods for five years into the future. For each year do the following:

   a. Edit the calendar.

      The Edit Accounting Calendar page appears.

   b. Click Add Year.

   c. Click Save.

12. When you have completed adding all the years, click Save and Close.

13. Click Done.
Note: After you start using the calendar, you can generate additional years but you cannot change other calendar options.

Enabling the Accounting Calendar You Created

You enable the calendar you created by selecting it to be the default calendar. Many sales features use the common calendar, so changing the selected calendar in the future can result in the loss of data.

To enable the calendar:

1. While signed in as a setup user, open the task Manage Calendar Profile Option from the implementation project or after searching for the task by name in the Setup and Maintenance work area.
2. On the Manage Calendar Profile Option page, select the Accounting Calendar Default profile option.
3. In the Profile Values table, click New.
4. For Profile Level, select Site.
5. Click the Profile Value list, and select the name of the calendar you created.
6. Click Save and Close.

Enabling the Time Periods You Generated for Analytics and Reports

You must run the Refresh Denormalized Time Dimension Table for BI process to make the time periods you generated available for analytics and reports.

To run the process:

1. Sign in as a setup user.
2. If you’re using the implementation project, then click Go to Task for the Refresh Denormalized Time Dimension Table for BI task and click Submit.
3. If you are not using the implementation project, then you can run this process from the Scheduled Processes work area by following these steps:
   a. Open the Navigator and select Scheduled Processes under the Tools heading.
      The Scheduled Processes Overview page appears.
   b. Click Schedule New Process.
      The Schedule New Process window appears.
   c. Enter Refresh Denormalized in the Name field and press Return.
   d. Click OK.
      The Process Details window appears.
   e. Click Submit.
   f. Click OK to close the confirmation and then Close.
6 Setting Up Geography Data

Setup Overview

You must import and set up reference geography data for the countries where you do business if you are setting up sales territories using geography as one of your dimensions and if you plan to validate address entries. The fictitious Vision Corp. is doing both. It plans to set up sales territories based on states in the US, so it must import geography data for the US. Also, Vision Corp. wants its salespeople to use a list of values to enter the states in their addresses. The state in the address must be validated because invalid entries would cause opportunities to be left out of forecasts.

You must enable validation to the level of granularity you need for your territories. For example, if Vision Corp. decided to set up territories at the postal code level, then the company would have to set up validation for state, city, county, and postal code.

Oracle licenses geography data that you can import, at no additional cost. Oracle is in the process of changing suppliers for its licensed data from Nokia to GBG | Loqate. GBG | Loqate offers more complete and more accurate data for more than 240 countries. During the transition, Oracle is making available a growing subset of the GBG | Loqate country data. New customers must import the GBG | Loqate data for countries where data is available, and can import the Nokia data for the rest. When Oracle completes the transition, Oracle customers can either update their geography data to GBG | Loqate or continue using Nokia. Oracle will no longer enhance Nokia data for countries that are available through GBG | Loqate.

Alternatively, you can license geography data from another supplier and import it from a file. For more information about importing third party geography data, see the Importing Geographies chapter of the Oracle Sales Cloud File-Based Data Import Guide available on docs.oracle.com.

The following table lists the setup tasks in the preferred setup order, provides the setup task names, and references to topics with step-by-step procedures. You can access all setup tasks from the Setup Geography Data folder in your implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
</table>
| 1    | Review the list of available countries from GBG | Loqate and Nokia. | N/A | See the following topics in this guide for the list of available countries:  
- List of Available Countries with GBG | Loqate Geography Reference Data  
- List of Available Countries with Nokia Geography Reference Data |
| 2    | If GBG | Loqate geography data exists for the country you want to import, then set the profile DaaS GBG | Loqate Data Import Enabled (ORA_HZ_ENABLE_DAAAS_LOQATE) to Yes. By default this profile is set to No and imports Nokia data. | Manage Administrator Profile Values | See the Specifying the Geography Data Supplier topic for details. |
### Setting Up Geography Data

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>If you are importing data for multiple countries and not all of these countries are available from GBG</td>
<td>Manage Geographies</td>
<td>See the Importing Geography Reference Data topic in this chapter</td>
</tr>
<tr>
<td></td>
<td>are available from GBG</td>
<td>Loqate, then you must set this profile multiple times.</td>
<td><img src="image1.png" alt="Image" /></td>
</tr>
<tr>
<td>4</td>
<td>Search for the country you want to import on the Manage Geographies page and select the Import Geography Data action.</td>
<td>Manage Geographies</td>
<td>See the Setting Up Geography Validation topic in this chapter</td>
</tr>
<tr>
<td></td>
<td>For the countries you imported, enable validation down to address level required for your territories and specify which address elements require lists of values.</td>
<td>Manage Geographies</td>
<td>See the Setting Up Geography Validation topic in this chapter</td>
</tr>
<tr>
<td></td>
<td>When you enable validation on an address element, the application suggests alternatives during address entry. Enabling a list of values requires the user to make a selection from a list. Both validation and lists of values are enforced in the UIs.</td>
<td>Manage Geographies</td>
<td>See the Setting Up Geography Validation topic in this chapter</td>
</tr>
<tr>
<td></td>
<td>Vision Corp. enables list of values for entering states in addresses and enables validation for the states because its territories are defined at the state level.</td>
<td>Manage Geographies</td>
<td>See the Setting Up Geography Validation topic in this chapter</td>
</tr>
<tr>
<td>5</td>
<td>The validation selection you made affects entries made in the application UI only. You must use the task Manage Administrator Profile Values to set the profile option Geography Address Validation Enabled to Yes to validate addresses you import.</td>
<td>Manage Administrator Profile Values</td>
<td>See the Setting Up Geography Validation topic in this chapter</td>
</tr>
<tr>
<td>6</td>
<td>Enable the mapping of account and contact addresses. With mapping enabled, salespeople on the go can view their contacts on a map and obtain directions with the click of a button.</td>
<td>Manage Geographies</td>
<td>See the Enabling Address Mapping topic in this chapter.</td>
</tr>
</tbody>
</table>

**Note:** If you are integrating with Oracle Social Data and Insight Cloud Service for data enrichment and with the Address Verification Cloud Service for address verification, then you must perform additional geography data setups as described in the Implementing Sales and Implementing Customer Data Management guides.
Specifying the Geography Data Supplier

If you are importing geography data licensed by Oracle, and GBG | Loqate geography data exists for the country where you do business, then set the system profile option DaaS GBG | Loqate Data Import Enabled (ORA_HZ_ENABLE_DAAS_LOQATE) to Yes. By default, the system profile is set to No and the application downloads Nokia data. If you are doing business in multiple countries, and not all the countries are yet available from GBG | Loqate, then you can download geography data from both suppliers by changing the value of this system profile, but you can download only one data set for each country.

1. Open the Manage Administrator Profile Values task from the implementation project or after searching for the task by name in the Setup and Maintenance work area.
2. In the Profile Option Code field located in the Search: Profile Option region, enter ORA_HZ_ENABLE_DAAS_LOQATE.
3. Click Search.
4. With the profile option selected in the search results, select Yes from the Profile Value list to download GBG | Loqate data. A setting of No downloads Nokia data.
5. Click Save and Close.

Importing Geography Reference Data

Use this procedure to import geography reference data licensed by Oracle. If the country data you want to import is not available from the supplier specified using the system profile option DaaS GBG | Loqate Data Import Enabled (ORA_HZ_ENABLE_DAAS_LOQATE), then the import action is disabled.

Note: The geography data is provided by Nokia and GBG | Loqate is third-party content. As per Oracle policy, this software and documentation may provide access to or information on content and services from third parties. Oracle and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content and services. Oracle and its affiliates are not responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

To import the geography data:

1. Sign in as a setup user.
2. Open the Manage Geographies task directly from the implementation project or after searching for the task by name in the Setup and Maintenance work area.
3. Enter either the country name in the Country Name field or the two-letter ISO code of the country in the Country Code field.
   Examples of ISO country codes include US (United States) and AT (Austria).
4. Click Search.
5. The Search Results display the country.
6. Select the country in the search results. Do not click the link.
7. Select Import Geography Data from the Actions menu.
8. Click OK to close the warning message.
8. Click OK to close the confirmation message.

The import of larger countries may require several hours to complete.

You can track the progress of the import process by selecting **Scheduled Processes** from the Navigator menu.

After the import is complete, you can search for the country again in the Manage Geographies page. The **Completed** icon (check mark) replaces **Go to Task** icon in the **Structure Defined** and **Hierarchy Defined** columns indicating the import completed successfully.

The following figure shows a screen capture of the Manage Geographies page after the import completes with the Completed icons (check marks) highlighted.

![Manage Geographies](image)

**Note:** Report any issues with GBG | Logate and Nokia data to Oracle Support who will contact the appropriate team for correction. Alternatively, you can make manual changes to the geography data by using the Manage Geographies task in the Setup and Maintenance work area. If you decide to use geography data from another data provider, then Oracle Support can delete the data and you can then load your data using File Import.

The **Geocoding Defined** and **Address Cleansing Defined** columns are used for additional features that you set up separately:

- Geocoding is a feature used to populate longitude and latitude for locations in a country. You must set up geocoding to enable mapping features in your application, such as the display of customer locations on a map in the UI. For details, see the Setting Up Geography Data chapter in the Oracle Customer Data Management Cloud Getting Started with Your Customer Data Management Implementation guide for details.

- Address cleansing makes it possible to validate addresses down to the street level. Note that to use address cleansing, you require a separate license for the Address Verification Cloud Service.

**Related Topics**

- Setting Up Geography Data chapter in the Getting Started with Your Customer Data Management Implementation guide
## List of Available Countries with GBG | Loqate Geography Reference Data

Oracle Applications Cloud provides third-party GBG | Loqate master geography data for import. The following table lists the countries for which the GBG | Loqate master geography data is available for import.

<table>
<thead>
<tr>
<th>Country Name</th>
<th>Country Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>AU</td>
</tr>
<tr>
<td>Austria</td>
<td>AT</td>
</tr>
<tr>
<td>Belgium</td>
<td>BE</td>
</tr>
<tr>
<td>Brazil</td>
<td>BR</td>
</tr>
<tr>
<td>Canada</td>
<td>CA</td>
</tr>
<tr>
<td>Chile</td>
<td>CL</td>
</tr>
<tr>
<td>France</td>
<td>FR</td>
</tr>
<tr>
<td>Germany</td>
<td>DE</td>
</tr>
<tr>
<td>Great Britain</td>
<td>GB</td>
</tr>
<tr>
<td>Italy</td>
<td>IT</td>
</tr>
<tr>
<td>Japan</td>
<td>JP</td>
</tr>
<tr>
<td>Kenya</td>
<td>KE</td>
</tr>
<tr>
<td>Netherlands</td>
<td>NL</td>
</tr>
<tr>
<td>Peru</td>
<td>PE</td>
</tr>
<tr>
<td>Portugal</td>
<td>PT</td>
</tr>
<tr>
<td>Qatar</td>
<td>QA</td>
</tr>
<tr>
<td>Spain</td>
<td>ES</td>
</tr>
<tr>
<td>Sweden</td>
<td>SE</td>
</tr>
</tbody>
</table>
List of Available Countries with Nokia Geography Reference Data

Nokia geography reference data is available for import for the countries listed in the following table.

<table>
<thead>
<tr>
<th>Country Name</th>
<th>Country Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Andorra</td>
<td>AD</td>
</tr>
<tr>
<td>Argentina</td>
<td>AR</td>
</tr>
<tr>
<td>Austria</td>
<td>AT</td>
</tr>
<tr>
<td>Belgium</td>
<td>BE</td>
</tr>
<tr>
<td>Brazil</td>
<td>BR</td>
</tr>
<tr>
<td>Bulgaria</td>
<td>BG</td>
</tr>
<tr>
<td>Canada</td>
<td>CA</td>
</tr>
<tr>
<td>Cayman Island</td>
<td>KY</td>
</tr>
<tr>
<td>Chile</td>
<td>CL</td>
</tr>
<tr>
<td>Croatia</td>
<td>HR</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>CZ</td>
</tr>
<tr>
<td>Denmark</td>
<td>DK</td>
</tr>
<tr>
<td>Dominican Republic</td>
<td>DO</td>
</tr>
<tr>
<td>Estonia</td>
<td>EE</td>
</tr>
<tr>
<td>Country Name</td>
<td>Country Code</td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Finland</td>
<td>FI</td>
</tr>
<tr>
<td>France</td>
<td>FR</td>
</tr>
<tr>
<td>Germany</td>
<td>DE</td>
</tr>
<tr>
<td>Greece</td>
<td>GR</td>
</tr>
<tr>
<td>Guadeloupe</td>
<td>GP</td>
</tr>
<tr>
<td>Holy See (Vatican City State)</td>
<td>VA</td>
</tr>
<tr>
<td>Hungary</td>
<td>HU</td>
</tr>
<tr>
<td>Iceland</td>
<td>IS</td>
</tr>
<tr>
<td>India</td>
<td>IN</td>
</tr>
<tr>
<td>Indonesia</td>
<td>ID</td>
</tr>
<tr>
<td>Ireland</td>
<td>IE</td>
</tr>
<tr>
<td>Isle Of Man</td>
<td>IM</td>
</tr>
<tr>
<td>Israel</td>
<td>IL</td>
</tr>
<tr>
<td>Italy</td>
<td>IT</td>
</tr>
<tr>
<td>Jamaica</td>
<td>JM</td>
</tr>
<tr>
<td>Latvia</td>
<td>LV</td>
</tr>
<tr>
<td>Liechtenstein</td>
<td>LI</td>
</tr>
<tr>
<td>Lithuania</td>
<td>LT</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>LU</td>
</tr>
<tr>
<td>Malaysia</td>
<td>MY</td>
</tr>
<tr>
<td>Malta</td>
<td>MT</td>
</tr>
<tr>
<td>Martinique</td>
<td>MQ</td>
</tr>
<tr>
<td>Country Name</td>
<td>Country Code</td>
</tr>
<tr>
<td>-----------------------------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Mexico</td>
<td>MX</td>
</tr>
<tr>
<td>Netherlands</td>
<td>NL</td>
</tr>
<tr>
<td>New Zealand</td>
<td>NZ</td>
</tr>
<tr>
<td>Norway</td>
<td>NO</td>
</tr>
<tr>
<td>Peru</td>
<td>PE</td>
</tr>
<tr>
<td>Poland</td>
<td>PL</td>
</tr>
<tr>
<td>Portugal</td>
<td>PT</td>
</tr>
<tr>
<td>Puerto Rico</td>
<td>PR</td>
</tr>
<tr>
<td>Reunion Island</td>
<td>RE</td>
</tr>
<tr>
<td>Romania</td>
<td>RO</td>
</tr>
<tr>
<td>Russian Federation (Russia)</td>
<td>RU</td>
</tr>
<tr>
<td>San Marino</td>
<td>SM</td>
</tr>
<tr>
<td>Singapore</td>
<td>SG</td>
</tr>
<tr>
<td>Slovakia</td>
<td>SK</td>
</tr>
<tr>
<td>Slovenia</td>
<td>SI</td>
</tr>
<tr>
<td>South Africa</td>
<td>ZA</td>
</tr>
<tr>
<td>Spain</td>
<td>ES</td>
</tr>
<tr>
<td>Swaziland</td>
<td>SZ</td>
</tr>
<tr>
<td>Sweden</td>
<td>SE</td>
</tr>
<tr>
<td>Switzerland</td>
<td>CH</td>
</tr>
<tr>
<td>Taiwan</td>
<td>TW</td>
</tr>
<tr>
<td>Turkey</td>
<td>TR</td>
</tr>
</tbody>
</table>
Setting Up Geography Validation

You must set up geography validation for those geography elements that you plan to use in your sales territories. Setting up validation also helps users fill in missing address information, and validate addresses during entry. For example, you can have users select states or other address elements from lists to ensure accuracy during entry, and you can have the application fill in missing values. For example, when the user enters a postal code, the application can retrieve the city and state.

Vision Corp. wants its salespeople to use a list of values to enter the states in their addresses and it plans to set up territories at the state level. For these reasons, validation must be set up at the state level.

Setting Up the Validation

1. Open the Manage Geographies task from the implementation project or after searching for the task by name in the Setup and Maintenance work area.

   The Manage Geographies page appears.

2. Search for a country you imported using either its name or its two letter ISO code. For example, you can search by entering either the country name United States or the two letter ISO code US, and clicking Search.

3. Select the country in the Search Results area.
The following figure shows the location of the Go to Task icon in the Validation Defined column on the Manage Geographies page.

4. Click **Go to Task** in the **Validation Defined** column.

The Manage Geography Validation page appears.

5. In the Address Style region, ensure that the **No Styles Format** address style is selected. You define validation for the No Styles Format address style so that the validations are performed for all addresses in the country.

   **Note:** The setup of address styles for your application is done elsewhere, using the Manage Address Formats task.

6. Select **Enable List of Values** in the Geography Mapping and Validation region to display the geography type as list of values during address entry in the UI. For example, to have users select states from a list, select **Enable List of Values** for **State**.

   Vision Corp. enables the list of values for **State** because the company uses states for its sales territories and wants to assure that state names are always entered correctly.

7. Select **Geography Validation** for all the geography types that you plan to use in territories.

   In our example, Vision Corp. plans to use set up geographies by state, so it selects **Geography Validation** for **State**.
The following figure shows the location of the Enable List of Values and Geography Validation options for the US State geography type.

![Manage Geography Validation: United States](image)

You must enable geography validation for all geography levels above the level you are planning to use for territories. If Vision Corp. decided to set up territories at the postal code level, it must select Geography Validation for state, city, county, and postal code.

**Note:** If you do not select the validation for an address element, then the application still suggests values to the user during address entry, but the application does not validate the address element.

8. Specify if you want to permit addresses that are not considered valid by the application to be saved by making a selection from the Geography Validation Level for Country list.
The available values are the following:

- **No validation**: permits users to save incomplete or incorrect addresses.
- **Error**: permits only valid addresses to be saved.

Vision Corp. wants to save all addresses, including incomplete and invalid addresses, so it selects **No validation**.

9. Click **Save and Close**.
10. Click **Done** in the Manage Geographies page.

### Turning on Validation for Address Import

By default, the validation you specified is enforced for creating addresses in the UI only. You must set the profile option Geography Address Validation Enabled to Yes for the validation to be enforced during import. Follow these steps to set the profile option:

1. Open the **Manage Administrator Profile Values** task from the implementation project or after searching for the task by name in the Setup and Maintenance work area.

   The Manage Administrator Profile Values page appears.

2. In the **Profile Display Name** field located in the Search: Profile Option region, enter **Geography Address Validation Enabled**.

3. Click **Search**.

4. With the profile option selected in the search results, select **Yes** from the **Profile Value** list.

5. Click **Save and Close**.

### Enabling Address Mapping

You can quite literally put your accounts and contacts on the map by enabling geocoding as described in this topic. Geocoding turns the addresses you enter or import into longitude and latitude coordinates so that the locations can be displayed on a map.

Enabling address mapping involves two steps:

1. Turning on the geocoding feature
2. Running a process that converts the addresses into coordinates

Salespeople must enter valid postal addresses for geocoding to work, so it’s a good idea for you to validate the addresses in your application by subscribing to Oracle Address Verification Cloud Service.
What You Are Enabling

Salespeople can take advantage of the geocoding in two ways:

- In the office, salespeople can view the location of an account address on the map while editing the account record.

![Map](image)

- Using Oracle CX Cloud Mobile on their smartphones, salespeople can view a map showing the locations of accounts and contacts within a certain radius of their current location, or any other location they choose. They can obtain
travel directions to any of the locations with the tap of a finger (CX Cloud Mobile passes the coordinates to the native mapping application on the phone).

Turning on Geocoding on the Manage Geographies Page
To turn on geocoding for a country, all you need to do is select the Geocoding Defined icon for the country where you want to turn it on. Here are the steps:

1. Open the Manage Geographies task from the implementation project or from Setup and Maintenance work area using the following:
   - Offering: Sales
   - Functional Area: Sales Foundation
Task: Manage Geographies

2. On the Manage Geographies page, search for a country you imported using either its name or its two letter ISO code. For example, you can search by entering either the country name United States or the two letter ISO code US, and clicking Search.

3. Select the Geocoding Defined icon.

4. Click Done

Here's a screenshot of the Manage Geographies page with Geocoding Defined icon highlighted:

Running the Populate Location Latitude and Longitude Process

Run the process that converts the addresses to the location latitude and longitude regularly and each time you import. Addresses that salespeople enter or addresses that you import don’t show up on the map until the process completes, so schedule the process to run as frequently as necessary. Here’s how to run the process:

1. In the Navigator, click Scheduled Processes under the Tools heading.
2. Click Schedule New Process.
3. Click the Name drop-down list icon and the Search link at the bottom of the list.
4. In the Search and Select: Name window, search for "Populate Location Latitude and Longitude Information".
5. Select the process name in the search results and click OK.
6. In the Schedule new Process dialog box, click OK to confirm your selection.
7. In the Process Details window, click Advanced to view the advanced options.
8. You can make the following entries on the Parameters Tab:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country Code</td>
<td>Leave this blank if you want to generate the coordinates for all the countries you enabled for geocoding, or enter a specific country code.</td>
</tr>
<tr>
<td>Start Date, End Date, and Regenerate Geocode</td>
<td>Leave these blank. The geocoding process picks up any addresses that have not been geocoded previously.</td>
</tr>
<tr>
<td>Batch Size</td>
<td>Leave this field blank unless you are geocoding more than 50,000 addresses at a time. If you are processing a large number of addresses, then enter 1000. By default, the application launches a subprocess for each batch of 500 addresses. There is a 10 subprocess maximum, so, if you are processing more than 50,000 addresses, you must run the process multiple times. You can increase the batch size up to a maximum of 1,000.</td>
</tr>
</tbody>
</table>
9. Schedule the process to run regularly do the following:

   a. Click the **Schedule** tab.
   b. Select **Using a Schedule** and specify the frequency.

10. Click **Submit**.

    The application confirms your process was submitted.

11. You can monitor the process completion on the Overview page. The process spawns multiple processes, depending on the batch size and the number of addresses you need to process.

**Related Topics**

- Configuring Address Verification chapter in the Getting Started with Customer Data Management guide
7 Configuring Search

Setup Overview

You must enable and configure the two primary ways of searching for data: the global search and the searches in each work area.

The two types of search serve slightly different purposes:

- You use the global search, located at the top of the application page, to search across objects in the application. For example, a search on a contact name finds all the accounts, opportunities, and leads associated with that contact.

  The following figure shows a screen capture of the global search box.

- For a more focused search, you can navigate to the work area of the object you are looking for and search for it there by name or using multiple search criteria.

  The following figure shows a screen capture of the Opportunity work area search fields. You use the Find field to search by name. You use the List field to select saved searches using multiple fields. You can also switch to an advanced search mode to search using multiple search criteria.

For more information how to use these two types of search, see the Using Search and Activities chapter of the Using Sales guide.

Perform the setups outlined in the following table. The two searches use different technology, so the setups you perform for one do not impact the other. Detailed steps are provided in procedures in this chapter. You can open all tasks from the Configure Search folder in your implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>You must enable work area search and run the required synchronization and search optimization processes.</td>
<td>Schedule Work Area Search Processes</td>
<td>See the Scheduling the Work Area Search Processes topic in this chapter.</td>
</tr>
</tbody>
</table>
Oracle Sales Cloud
Getting Started with Your Sales Implementation

Chapter 7
Configuring Search

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Using the Schedule Work Area Search Processes task, you enable search and run the processes at the intervals recommended by Oracle with the click of the Submit button.</td>
<td>Manage Administrator Profile Values</td>
<td>See Enabling the Global Search Profile Option in this chapter.</td>
</tr>
<tr>
<td>2</td>
<td>Enable global search by setting the system profile option FUSION_APPS_SEARCH_ENABLED to Y at the Site level.</td>
<td>Manage Search View Objects</td>
<td>See Deactivating Search on Application Objects in this chapter.</td>
</tr>
<tr>
<td>3</td>
<td>Deactivate global search on any application objects you do not use. Deactivating objects removes them from the global search UI and preserves system resources. By default, Oracle enables global search for all searchable objects and schedules these objects to be indexed daily on a staggered schedule.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You can configure global search behavior further by following the procedures described in the Setting Up Search chapter in the Implementing Sales guide.

Scheduling Work Area Search Processes

You can activate work area searches and run the required synchronization processes at the recommended intervals by clicking Submit on the Scheduling the Work Area Search Processes quick setup page as follows. If your implementation requires running these processes at different intervals you must schedule the processes separately using individual tasks available from the Setup: Sales page.

1. From the implementation project, open the Schedule Work Area Search Processes task. Alternatively, you can open this task from the Setup: Sales page, by clicking the Quick Setup (gears) icon for the Sales Foundation functional area.

   The Scheduling Work Area Search Processes page appears.

2. Click Submit.

   Your action does the following:

   - Enables the different work area searches.
   - Runs the Synchronize CRM Search Indexes process every five minutes. This process sets up the search index.
   - Runs the Optimize CRM Search Indexes process weekly. This process keeps the index from getting fragmented.
Enabling the Global Search Profile Option

Use this procedure to enable global search by setting the Global Search Enabled profile option:

1. Sign in as a setup user and open the Manage Administrator Profile Values task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.

   The Manage Administrator Profile Values page appears.

2. In the Search: Profile Option region, Profile Option Code field, enter FUSION_APPS_SEARCH_ENABLED.

3. Click Search.

   The application displays the profile option information. You can set the FUSION_APPS_SEARCH_ENABLED profile option at the Site level.

4. In the FUSION_APPS_SEARCH_ENABLED: Profile Values section, select Yes from the Profile Value list.

5. Click Save and Close.

   Tip: You must sign out and sign in again to see the global search box at the top of the page.

Deactivating Global Search on Application Objects

Oracle activates global search on all sales application objects where search is available. Use this procedure to deactivate any objects you are not using to conserve system resources.

To deactivate search on unused objects:

1. While signed in as a setup user open the Manage Search View Objects task from the implementation project. Setup users and sales administrators can also search for the task by name in the Setup and Maintenance work area.

   The Manage Search View Objects page appears.

2. Select each object you want to remove from search and click Deactivate.

3. You must click Refresh to see the updated status.

4. Click Done.
8 Getting Ready to Create Sales Users

Preparing to Create Sales Users Setup Overview

Before you create sales application users either in the UI or by importing them from a file, you must perform the tasks described in this chapter. Read the What You Must Do Before Creating Sales Users topic and perform the tasks listed in the following table. Detailed steps are provided in separate procedures referenced in the table.

You can open all tasks for this setup from the Create Sales Users folder in your implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create any additional resource roles you need. Vision Corp. creates the Inside Sales resource role for the inside sales representatives.</td>
<td>Manage Resource Roles</td>
<td>Creating Additional Resource Roles topic in this chapter</td>
</tr>
<tr>
<td>2</td>
<td>Set up provisioning rules to automatically provision the appropriate job roles and abstract roles for the additional resource roles you created.</td>
<td>Manage HCM Role Provisioning Rules</td>
<td>Creating Rules to Automatically Provision Job Roles to Sales Users in this chapter</td>
</tr>
<tr>
<td>3</td>
<td>Optionally, you can enable duplicate checking for the email addresses you enter while creating users in the UI. (User import already checks for duplicates.)</td>
<td>• Manage Profile Options • Manage Administrative Profile Values</td>
<td>Preventing Entry of Duplicate User Email Addresses topic in this chapter</td>
</tr>
</tbody>
</table>

What You Must Do Before Creating Sales Users

When you create sales application users either in the UI or by importing them, you not only provision the permissions the users need to do their jobs, but you also build the organization chart for your sales organization. This means that you must set up not only the provisioning rules, but also the elements that the application uses to create the organization chart, which can be viewed in the Resource Directory. Oracle supports matrix management, so the resource hierarchy you build does not have to match the formal reporting hierarchy in the Oracle Global Human Resources Cloud or other human resources application.

The following figure shows a screen capture of a portion of the Vision Corp. resource hierarchy as it appears in the Resource Directory. Aside from their names, all users in the hierarchy must have:

- A resource role (highlighted in the figure by callout 1)
A name describing the role each resource plays in the organization. Resource roles display right underneath user names in the Resource Directory and elsewhere in the UI. Resource roles are also used as the primary condition in the role provisioning rules.

- A resource organization (callout 2)

You must create a resource organization for every manager. Each individual contributor who is not a manager automatically inherits the manager’s organization. The name of the resource organization need not be any formal department name, but you should avoid using manager names to accommodate hierarchy changes.
The application builds the resource organization hierarchy using the management hierarchy you specify when you create users. You must enter a manager for each user you create, except for the top of the resource hierarchy.

Resource Roles Provided by Oracle

Oracle provides you with the following standard sales organization resource roles and the appropriate job roles for each:

- Channel Account Manager
- Channel Sales Manager
- Channel Operations Manager
- Chief Executive Officer
- Contract Administrator
- Contract Manager
- Customer Data Steward
- Data Steward Manager
- Partner Administrator
- Partner Sales Manager
- Partner Sales Representative
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Salesperson
- Sales Restricted User
- Sales Setup User
- Sales Vice President

\* Note: \* Except for the Chief Executive Officer and the Salesperson, there is a corresponding job role for each of the resource roles provided by Oracle. The job role corresponding to the Salesperson resource role is Sales Representative. The Chief Executive Officer is assigned the Sales Vice President job role.

Role-Provisioning Rules Provided by Oracle

If you followed the instructions in the Entering Your Company Information and Corporate Currency topic earlier in your setup, then your application creates the role provisioning rules that automatically assign users with the job roles and abstract roles required to do their job. If you created your enterprise structure using another process, then you must create all of the role-provisioning rules manually using the Manage HCM Role Provisioning Rules task. For details, see the Creating Rules to Automatically Provision Job Roles to Sales Users topic in this chapter.

The following table lists the names of the role-provisioning rules provided by Oracle, the condition which triggers the provisioning, and the job and abstract roles each rule provisions. You can obtain a description of each job and abstract role from the Oracle Sales Cloud Security Reference guide.

<table>
<thead>
<tr>
<th>Provisioning Rule Name</th>
<th>Condition</th>
<th>Job or Abstract Roles Provisioned</th>
</tr>
</thead>
<tbody>
<tr>
<td>Channel Account Manager</td>
<td>HR Assignment Status is Active</td>
<td>Channel Account Manager</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Channel Account Manager</td>
<td>Resource</td>
</tr>
<tr>
<td>Provisioning Rule Name</td>
<td>Condition</td>
<td>Job or Abstract Roles Provisioned</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>------------------------------------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Channel Sales Manager</td>
<td>HR Assignment Status is Active</td>
<td>Channel Sales Manager</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Channel Sales Manager</td>
<td>Resource</td>
</tr>
<tr>
<td>Channel Operations Manager</td>
<td>HR Assignment Status is Active</td>
<td>Channel Operations Manager</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Channel Operations Manager</td>
<td>Resource</td>
</tr>
<tr>
<td>Chief Executive Officer</td>
<td>HR Assignment Status is Active</td>
<td>Sales VP</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Chief Executive Officer</td>
<td>Resource</td>
</tr>
<tr>
<td>Contract Administrator</td>
<td>HR Assignment Status is Active</td>
<td>Contract Administrator</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Contract Administrator</td>
<td>Resource</td>
</tr>
<tr>
<td>Contract Manager</td>
<td>HR Assignment Status is Active</td>
<td>Contract Manager</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Contract Manager</td>
<td>Resource</td>
</tr>
<tr>
<td>Customer Data Steward</td>
<td>HR Assignment Status is Active</td>
<td>Customer Data Steward</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Customer Data Steward</td>
<td>Resource</td>
</tr>
<tr>
<td>Data Steward Manager</td>
<td>HR Assignment Status is Active</td>
<td>Data Steward Manager</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Data Steward Manager</td>
<td>Resource</td>
</tr>
<tr>
<td>Partner Administrator</td>
<td>Resource Role is Partner Administrator</td>
<td>Partner Administrator</td>
</tr>
<tr>
<td>Partner Sales Manager</td>
<td>Resource Role is Partner Sales Manager</td>
<td>Partner Sales Manager</td>
</tr>
<tr>
<td>Partner Sales Representative</td>
<td>Resource Role is Partner Salesperson</td>
<td>Partner Sales Representative</td>
</tr>
<tr>
<td>Sales Administrator</td>
<td>HR Assignment Status is Active</td>
<td>Sales Administrator</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Sales Administrator</td>
<td>Resource</td>
</tr>
<tr>
<td>Sales Lead Qualifier</td>
<td>HR Assignment Status is Active</td>
<td>Sales Lead Qualifier</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Sales Lead Qualifier</td>
<td>Resource</td>
</tr>
<tr>
<td>Sales Manager</td>
<td>HR Assignment Status is Active</td>
<td>Sales Manager</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Sales Manager</td>
<td>Resource</td>
</tr>
<tr>
<td>Sales Representative</td>
<td>HR Assignment Status is Active</td>
<td>Sales Representative</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Salesperson</td>
<td>Resource</td>
</tr>
<tr>
<td>Provisioning Rule Name</td>
<td>Condition</td>
<td>Job or Abstract Roles Provisioned</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>----------------------------------------</td>
<td>-----------------------------------</td>
</tr>
<tr>
<td>Sales Restricted User</td>
<td>HR Assignment Status is Active</td>
<td>Sales Restricted User</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Sales Restricted User</td>
<td>Resource</td>
</tr>
<tr>
<td>Sales Setup User</td>
<td>HR Assignment Status is Active</td>
<td>Application Implementation Consultant</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Sales Setup User</td>
<td>IT Security Manager</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Application Diagnostics Administrator</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sales Administrator</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Sales Analyst</td>
</tr>
<tr>
<td>Sales Vice President</td>
<td>HR Assignment Status is Active</td>
<td>Sales VP</td>
</tr>
<tr>
<td></td>
<td>Resource Role is Sales Vice President</td>
<td>Resource</td>
</tr>
<tr>
<td>Contingent Worker</td>
<td>HR Assignment Status is Active</td>
<td>Contingent Worker</td>
</tr>
<tr>
<td></td>
<td>System Person Type is Contingent Worker</td>
<td></td>
</tr>
<tr>
<td>Employee</td>
<td>HR Assignment Status is Active</td>
<td>Employee</td>
</tr>
<tr>
<td></td>
<td>System Person Type is Employee</td>
<td></td>
</tr>
</tbody>
</table>

You create sales users as employees, so two role-provisioning rules come into play for each user: the rule triggered by the user's resource role and the rule triggered by the fact that they are employees. For example, when you create a user with the Sales Manager resource role provided by Oracle, then the application automatically provisions the Sales Manager job role and the Resource abstract role. Because you are creating the user as an employee, the application also provisions the Employee role.
abstract role. The following figure shows the two rules which are triggered when you create an employee resource with the Sales Manager resource role (highlighted by callout 1).

Creating Additional Resource Roles and Provisioning Rules

You must create additional resource roles using the Manage Resource Roles task from the Setup and Maintenance work area if:

- You want other job titles to display for your users.
  
  For example, you must create an Inside Sales resource role if you want to include the Inside Sales title in your organization chart. Inside Sales is not one of the resource roles created for you.

- You want to provision some users with special privileges.
  
  For example, if you want to have one of the sales managers in your organization perform the sales administration role in addition to the sales manager role, then you must create a new resource role to assign those roles.

- You want to create a sales administrator who is a manager.
  
  The Sales Administrator resource role provided by Oracle is intended for an individual contributor (member).

If you create a resource role, then you must also create a corresponding role-provisioning rule. For example, if you created an Inside Sales resource role, then you must create a role provisioning rule to provision users with one or more of the available job roles and the Resource abstract role.
Creating Additional Resource Roles

This topic describes how to create additional resource roles. After you create a resource role, you must create the appropriate provisioning rules to provision the user with the required job and abstract roles. The resource role by itself is only a title.

Creating a Resource Role

1. Sign in as a setup user and open the Manage Resource Roles task from the implementation project or after searching for the task by name in the Setup and Maintenance work area. The Manage Resource Roles page appears.
2. To review all the existing resource roles, click Search without entering search criteria. All the available resource roles are listed. Roles that are predefined by Oracle are labeled System.
3. Click Create to create a new resource role. The Create Role page appears. The following figure shows a screen capture of the page.

   ![Create Role Page]

4. In the Role Name field, enter the name of the resource role as you want it to appear in the application UI, for example, Inside Sales.
5. In the Role Code field, enter a unique internal name in capital letters. No spaces are permitted, but you can use the underscore character (_) instead. For example, enter INSIDE_SALES.
6. If the resource role belongs to a manager, select the Manager option. If the resource role belongs to an individual contributor, such as inside sales representatives, then select the Member option.
7. From the Role Type list, select Sales to classify the role that you are creating.
8. Click **Save and Close**.

### Creating Rules to Automatically Provision Job Roles to Sales Users

You must create role provisioning rules for any new resource roles you created, such as the Inside Sales Representative. For the Inside Sales Representative and all other internal sales users, including sales administrators, you must add the Resource abstract role in addition to the required job roles. The Resource abstract role permits the users to access the Resource Directory. Do not add the Resource abstract role for partner roles.

#### Creating a Provisioning Rule

1. Sign in as a setup user and open the task **Manage HCM Role Provisioning Rules** from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area. The Manage Role Mappings page appears.
2. Click **Create**.
   The Create Role Mapping page appears.
3. In the **Mapping Name** field, enter a name that helps you identify the mapping, for example, *Inside Sales Representative*.
4. In the **Conditions** region, enter the two conditions listed in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Role</td>
<td>Select the resource role you want to provision, for example, Inside Sales Representative.</td>
</tr>
<tr>
<td>HR Assignment Status</td>
<td>Select <em>Active</em>. This additional condition ensures that the provisioned roles are automatically removed if the user is terminated in Global Human Resources.</td>
</tr>
</tbody>
</table>

5. In the Associated Roles region, click **Add** to add the job roles you want to provision. For the inside sales representative, add the **Sales Representative** job role.
6. For all internal sales users, including the inside sales representative, add the **Resource** abstract role. Do not add this role for partner roles.
7. Make sure the **Autoprovision** option is selected for all the roles.
8. Click **Save and Close**.

### Preventing Entry of Duplicate User Email Addresses

You can prevent the entry of duplicate email addresses when creating users using the Create User page by enabling email validation as described in this topic. The validation displays a warning message if you enter a duplicate value. The message provides the name, the user name, or both of the email owner. User import includes its own separate duplicate checking which is enabled by default.

To enable the email validation, you first create and then set a profile option.
Creating the Profile Option

1. Open the Manage Profile Options task from the Implementation Project. The task is located in the Create Sales Users folder.

You can also search for the task in the Setup and Maintenance by clicking the Tasks panel tab, then selecting Search.

2. On the Manage Profile Options page, click the New icon in the Search Results section.

3. On the Create Profile Option page, complete the required values as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile Option Code</td>
<td>PER_MANAGE_USERS_EMAIL_VALIDATION</td>
</tr>
<tr>
<td>Profile Display Name</td>
<td>Enable Validation of User Work Email</td>
</tr>
<tr>
<td>Application</td>
<td>Sales</td>
</tr>
<tr>
<td>Module</td>
<td>Users</td>
</tr>
<tr>
<td>Start Date</td>
<td>Select a start date.</td>
</tr>
</tbody>
</table>

4. Click Save and Close.

5. In the Profile Option Levels section of the Manage Profile Options page, select the Enabled and Updatable options at the Site level.

6. Click Save and Close.

Setting the Profile Option

1. Open the Manage Administrator Profile Values task from the implementation project.

2. On the Manage Administrator Profile Values page, enter PER_MANAGE_USERS_EMAIL_VALIDATION in the Profile Option Code field and click Search.

3. In the Profile Values section of the search results, click the New icon.

4. Enter Site in the Profile Level field and Y in the Profile Value field.

5. Click Save and Close.
9 Creating Sales Users in the UI

Setup Overview

After you have set up any additional resource roles and role-provisioning rules, you are ready to create sales users in the UI. Because you must specify the manager for each user you create, start creating users from the top of the corporate hierarchy and work your way down. Oracle recommends that you start at the very top of the corporate hierarchy, so you can easily add additional branches in the future.

The following table lists the steps to follow when creating sales users. You can open these tasks from the Create Sales Users folder in the implementation project. Alternatively, you can search for the tasks by name in the Setup and Maintenance work area. You can also reach the Manage Users work area, where you create the user records, from the Navigator by clicking Users and Roles under the My Team heading.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Before you create users, review your user notifications and preferences setup. When you are create the CEO and top company officers as users, you do not want to accidentally spam them with password notifications.</td>
<td>Manage Applications Security Preferences</td>
<td>See the Setting Up User Account Preferences chapter in this guide.</td>
</tr>
<tr>
<td>2</td>
<td>Create the CEO or another top user in the hierarchy and his or her resource organization. The resource organization you create automatically becomes the top organization in the hierarchy. You do not enter a manager for this user.</td>
<td>Manage Users</td>
<td>See the Creating Sales Users in the UI topic in this chapter.</td>
</tr>
<tr>
<td>3</td>
<td>Create the rest of the users, starting right below the top of the hierarchy. Work your way down because you must select the manager for every user you create. When you create a manager user, you must also create his or her resource organization. Users who are not managers inherit the resource organization of their managers.</td>
<td>Manage Users</td>
<td>The same Creating Sales Users in the UI topic.</td>
</tr>
<tr>
<td>4</td>
<td>If you are using some of these users for testing your setups, then you must manually reset their passwords in the Security Console work area.</td>
<td>Manage Applications Security Preferences</td>
<td>See the Setting Up User Account Preferences chapter in this guide.</td>
</tr>
</tbody>
</table>
After creating the first few users in the top of your hierarchy, you can import the rest as described in the next chapter.

**Related Topics**

- Managing Sales Users chapter in the Securing Sales guide

**About Creating the Vision Corp. Sales Organization Hierarchy**

Although Vision Corp.'s pilot implementation is limited to the US sales organization only, Vision Corp. starts the organization hierarchy at the Chief Executive Officer. Starting with the CEO makes it easy to add other branches of the organization in the future.
Creating Sales Users in the UI

Vision Corp. creates the first two users in the UI: William Taylor, Chief Executive Officer, and Peter Apt, the Vice President of Global High Tech. You must create the first user at the top of the hierarchy. Creating users in the UI also makes it possible to check if the provisioning rules work correctly. Vision imports the rest of the users as described in the next chapter.

Make sure that you obtain the sign-in information for a representative sample of users, so that you can use those users for testing. For example, to test account and opportunity assignment as well as forecasting, you'll want to sign in as a salesperson and manager in each sales organization: US Products West, Sales Support, and US Products East. To test forecasting and quotas, you must also sign in as the sales administrator.
Video

Watch: This tutorial shows you how to create a sales user in the UI.

Procedure

Use the following procedure to create sales users in the UI. Note that the procedure is slightly different for managers and individual contributors:

- You must assign each manager with his or her own resource organization. You can create the resource organization while creating the manager.
- Each individual contributor automatically inherits her manager’s resource organization.

The application determines who is a manager from the resource role you assign to the user.

Note: When you create users in the sales application, you are creating a resource hierarchy that’s separate from the human resources hierarchy for employees. A user you create in the sales application does not have to report to the same manager in the employee hierarchy.

To create sales users:

1. Open the Manage Users task from the implementation project or you can search for the task by name in the Setup and Maintenance work area. You can also open this task from the Navigator, by clicking Users and Roles under the My Team heading.
2. On the Search Person page, click Create.
   The Create User page appears.
3. Enter the user's name and a unique e-mail address in the Personal Details region.
   The application sends all notifications regarding password changes to this e-mail address unless you turn off notifications in the Security Console work area.

Tip: To ensure that the user is never notified by e-mail, you can change the domain of the e-mail addresses to any of the special discard e-mail domains provided by Oracle for this purpose. For example, you can substitute discard.mail.us1.cloud.oracle.com. See the Using Test E-Mail Accounts During User Setup topic in the Implementing Sales guide for details.

After you create the user, you can no longer update the e-mail address in the Manage Users work area. You must instead update the e-mail address on the Users tab in the Security Console work area or using file import.
The following figure shows a screen capture of the Personal Details region with sample data.

4. The application prepopulates today’s date in the **Hire Date** field and uses that date as the start date for the resource.

   If you are planning to use quotas, then you must make sure that the hire date is a date before the start of the first quota period. For example, if you are allocating monthly quotas for fiscal year July 01, 2015 to June 30, 2016, then you must enter a hire date of **7-1-2015** or earlier. You cannot change the hire date after you create the user.

5. In the User Details region, enter the user name.

   If you leave the **User Name** field blank, then the application automatically creates a user name for you. By default, the application uses the e-mail as the user name. You can select other default user name formats, such as first name initial and last name, on the Administration tab in the Security Console work area.

6. Selecting the **Send user name and password** option in the User Notification Preferences region sends users a URL they can use to reset their password and sign in. The application sends the e-mail notification immediately after you save the user record for the first time. This option is available only before you save. After you save the record, you must instead use the Users tab in the Security Console work area to reset the password and send the notification as described in a related topic.

7. Make the following entries in the Employment Information region:
   - Select **Employee** from the **Person Type** list.
   - From the **Legal Employer** list, select the legal employer. There should be only one value available: your company name followed by the suffix LE.
   - From the **Business Unit** list, select the business unit. There should be only one value available: your company name followed by the suffix LE BU.

   Neither the legal employer name nor the business unit name is visible in the sales application, so the names do not need to correspond to actual entities in your company.

   **Note:** The remaining fields in the Employment Information region are not used by the sales application. These fields include: Job, Grade, Department, Location, Mail Stop, and Manager.

8. Make the following entries in the Resource Information region:
   - From the **Resource Role** list, select the role the user plays in the resource organization.
     For example, for the CEO, select **Chief Executive Officer**.
   - From the **Reporting Manager** list, select the user’s manager. For the top user in your hierarchy, such as the CEO, leave this field blank.
c. If the user you are creating is a manager, then you must enter a resource organization for the user in the Organization field.

For the top of the resource hierarchy, select the resource organization you created earlier. For other managers you can create resource organization ahead of time using the Manage Internal Resource Organizations task in the Setup: Sales page, or you can create the resource organization using the following steps:

i. Click Create link at the end of the Organization list.

The following figure shows a screen capture of the Resource Information region highlighting the location of the Create link at the end of the Organization list.

![Resource Information](image1)

The Create Organization window appears.

ii. Enter the organization name.

iii. Make sure the Sales option is selected and click OK.

d. If the user you are creating is a not a manager then the resource organization is automatically copied from the manager.

9. Click Autoprovision Roles.

The application provisions the job and abstract roles according to the role provisioning rules.

10. Click Save and Close.

The application creates the user. If you selected the Send User Name and Password option, then the application also sends the e-mail with the URL the user can use to sign in to the application for the first time.

### Resetting User Passwords

Setup users, who are provisioned with the IT Security Manager job role, can use the Users tab in the Security Console work area to reset passwords for all application users.
Note: Users who can’t access the Security Console can only reset their own passwords by clicking the Set Preferences link in the Settings and Actions menu (available by clicking your user name) or by using Forgot Password on the sign-in page.

To reset a user’s password in the Security Console:

1. Open the Manage Applications Security Preferences task from the implementation project. Alternatively, you can search for this task by name in the Setup and Maintenance work area or use the Navigator.
2. You can ignore and close any warnings regarding the scheduling of the Import Users and Roles Application Security Data job.
3. Click the Users tab.
4. Search for the user using one of the following:
   - First or last name, but not both
   - User name

Here’s a screenshot of the Users tab. Callout 1 highlights the location of the Action menu.

5. From the Action menu, select Reset Password.

The Reset Password window appears, shown in the following screenshot. The window displays the password strength policy.
6. Select the **Automatically generate password** option to send an email to users with a link they can use to create their own passwords.

7. To reset the password yourself, do the following:
   
   a. Select the **Manually change the password** option.
   
   b. Enter the new password twice.

   **Note:** The manual option is available only if you selected the **Administrator can manually reset password** option while editing the password policy for the DEFAULT user category in the Security Console. See the Setting Preferences for User Names, Passwords, and Notifications topic for details.

8. Click **Reset Password**.

**Related Topics**

- Setting Preferences for User Names, Passwords, and Notifications
10 Importing Sales Users

Importing Sales Users Overview

After you create a couple of sales users in the UI to test your setup, you are ready to import the rest of the sales users using the Excel macro provided by Oracle. You can import up to 1000 users at a time using the macro. You must ensure that each import completes before starting another. The import creates the resource organizations for each manager, creates the sales organization hierarchy, and provisions the users with the job roles and abstract roles they need.

**Note:** You can only use the import for sales users. You cannot use it to import service users or contracts users, for example.

The following table provides an overview of the setup steps for importing users using the R13 Sales User Quick Import Macro. The task name column lists the tasks that you can open either from the implementation project or from the Setup and Maintenance work area. For detailed steps refer to the procedures listed in the Where to Get More Details column.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>You must synchronize sales security information with the LDAP directory before you import sales users for the first time and also after creating any of your own job roles. To retrieve the latest security information, you run the Retrieve Latest LDAP Changes process using the Run User and Roles Synchronization Process task.</td>
<td>Run User and Roles Synchronization Process</td>
<td>See Synchronizing Your Sales Application with the LDAP Directory topic in this chapter.</td>
</tr>
<tr>
<td>2</td>
<td>Sign in to support.oracle.com and download the R13 Sales User Quick Import Macro for Release 13 18B and 18C from article Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1). The article organizes the files by release update because different versions of the macros are available for different R13 updates. Use the 18B files for 18C, for sales users:R13_Sales_User_Quick_Import_Macro_18B.xlsm</td>
<td>None.</td>
<td>See the Downloading and Using the User Macro topic in this chapter.</td>
</tr>
<tr>
<td>3</td>
<td>In the macro, you:</td>
<td>None.</td>
<td>For steps to obtain the names of the business unit and legal entity see the topic Reviewing Your Company Information and Specifying Your Corporate</td>
</tr>
</tbody>
</table>
### Step | Description | Task Name | Where to Get More Details
--- | --- | --- | ---
2. | Download any additional resource roles you created by clicking a button on the Role Details worksheet. | | See Downloading and Using the User Import Macro topic in this chapter for instructions on using the macro.
3. | Enter the user information in the Template worksheet, starting from the top of the user hierarchy. | | |
4. | Click **Create Import Activity** to import. | | |

### Step | Description | Task Name | Where to Get More Details
--- | --- | --- | ---
4 | In the Security Console work area reset the password for a sales user you want to use for testing. | Manage Application Security Preferences | See the Resetting User Passwords topic in the Creating Setup Users chapter.
5 | Sign in as the test user and review the resource hierarchy you created by navigating to the Resource Directory and displaying a graphical representation of the hierarchy. You can upload user images and correct any minor errors in the Manage Users work area. Alternatively, you can make corrections in the macro and import again. | This task is not available in the implementation project. Instead, click **Resource Directory** in the Navigator. | See the Reviewing the Resource Hierarchy You Created topic in this chapter.

---

### Synchronizing Your Sales Application with the LDAP Directory

You must run the Retrieve Latest LDAP Changes process using the Run User and Roles Synchronization Process task before you import sales users for the first time and if you create your own job roles. The process retrieves the latest security information from the LDAP directory. To run the process, do the following:

1. Open the task **Run User and Role Synchronization Process** from the implementation project or:
   a. Navigate to the Setup and Maintenance work area.
   b. Make sure **Sales** is selected on the Setup page.
   c. On the Setup: Sales page, select the **Users and Security** functional area.
   d. Click the **Run User and Roles Synchronization Process** task link.

   The Retrieve Latest LDAP Changes page appears.

2. Click **Submit**.
Downloading and Using the User Import Macro

Video

Watch: This tutorial shows how you can import sales users using the Sales User Quick Import Excel macro you can download from My Oracle Support. The content of this video is also covered in text topics.

Downloading the Macro for Importing Users

This topic explains how to download the Microsoft Excel macro for importing users from My Oracle Support.

Follow these steps to download the macro:

1. Sign in to support.oracle.com.
2. Search for 2229503.1.
3. Scroll down in the article to the Details region, locate the section pertinent to your application update, and click Sales User Import Macro in the Excel Macro Files column to download the Excel macro file from the table.
4. Save the macro file to a folder on your computer.
   The application saves import logs to the same folder.

Entering Data into the Sales User Import Macro and Importing

Follow these steps to enter data into the R13 Sales User Quick Import Macro and perform the import. You can import up to 1000 user records at a time. If you perform multiple imports using the macro, you must ensure that each import completes before starting another.

Before entering data into the macro, confirm that you have the following information:

- Legal entity name (usually your company name followed by LE)
- Business unit name (usually your company name followed by BU)
- The e-mail and resource organization name for the resource who is the manager of the first person or persons you are importing.
  The manager’s e-mail and resource organization name form the link between the resources you created in the UI and those you are about to import.

Note: You can modify the macro to import additional fields, including fields you created. If you modify the macro, then you must create a new mapping to use in your import. The steps for modifying the macros are not covered in this guide.

Once you have all required information, you can enter the user data into the macro:

1. Open the R13 Sales User Quick Import Macro file you downloaded earlier. The file name of the file you downloaded must include the number of your application update.
2. Enable macros in Microsoft Excel, if required.
3. Navigate to the Role Details worksheet. The standard sales roles are listed:
   - Chief Executive Officer
   - Sales Administrator
   - Sales Manager
   - Sales Vice President
   - Salesperson

4. If you created additional resource roles, click **Populate Roles from Server** and enter the following details in the Login window:
   - Host information for your environment.
     The host name is the portion of the URL of your environment between `https://` and the next forward slash, `/`. You can obtain the correct host name by signing in to your application. Do not copy the host name from your application sign-in page because the URL is different.
   - Your user name
   - Your password

The following figure shows a screen capture of the Login window with sample host information for a test environment.

![Login Window](image)

5. Click **Submit**.

The macro retrieves the roles you set up from your environment and enters them into the worksheet so they are available as the list of values in the Resource Role column in the Template worksheet.

6. Navigate to the Template worksheet.
7. In the fields at the top of the sheet, enter your legal entity and business unit.
The following figure shows a screen capture of the top of the worksheet with sample data.

In this same region, the Mapping field is already set to Default. The application uses the standard mapping for importing employee resources. If you added additional columns to the macro, then you would have to enter a mapping number for the mapping you created. Extending the macro is not covered in this guide.

8. Enter the sales users that you want to import, working your way down the sales hierarchy. You must start at the top because you must enter a manager for each user you import.

For each person, enter the details listed in the following table:

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Name</td>
<td>Enter the first name as you want it to appear in the sales application.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Enter the last name as you want it to appear in the sales application.</td>
</tr>
<tr>
<td>E-mail</td>
<td>You must enter a unique e-mail address.</td>
</tr>
<tr>
<td>Manager’s E-mail</td>
<td>Enter the manager’s e-mail address. The application uses this address to build the management hierarchy.</td>
</tr>
<tr>
<td>Resource Role</td>
<td>From the list, select the name of the resource role that you are assigning to the user.</td>
</tr>
<tr>
<td>Organization Name</td>
<td>For each manager, enter his or her resource organization. This field is disabled for individual contributors because they inherit the organizations of their managers. The organization names you enter here appear in the Resource Directory and elsewhere in the UI.</td>
</tr>
<tr>
<td>Manager Organization Name</td>
<td>Enter the organization name of the user’s manager. You must make this entry both for managers and individual contributors. You must enter the names exactly without additional spaces and with the correct capitalization. If the manager is one of the users in your macro, then the macro makes this entry for you.</td>
</tr>
</tbody>
</table>

The macro provides some validations and defaults as you make your entries. For example:

- You receive an error if you enter a malformed e-mail or if you enter an e-mail of a nonmanager in the Manager’s E-Mail field.
- Entering a manager’s e-mail automatically populates the manager’s organization.

9. When you are done with your entries, click Create Import Activity.
10. If the **You must correct errors in your entries** message appears, then:

   a. Click **OK**

      The Error worksheet displays your errors.

   b. Click each error link in column D and make the correction on the Template worksheet.

   
   Note: After you correct an error, you must click outside the field for the correction to be recognized.

   c. Click **Create Import Activity** again.

11. On the Login page, enter the host, user name, and password if required.

    If you previously entered these details on the Role Details worksheet when retrieving roles from the server, then the same values appear here.

12. Click **Submit**.

    The application displays one of the messages listed in the following table:

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted</td>
<td>Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>successfully.</td>
<td></td>
</tr>
<tr>
<td>Unable to connect to the server at this time.</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>Unable to submit the file import activity.</td>
<td>You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors work sheet to view the error details.</td>
</tr>
<tr>
<td>Check log for details.</td>
<td></td>
</tr>
</tbody>
</table>

13. If your import activity was submitted successfully, then click **Activity Details** to monitor the progress of the file import activity directly from the macro.
The Activity Details window appears, listing the import activity name, its ID, and its status. The following figure shows a screen capture of the window.

The import may take a few minutes to complete.

- If the import activity is still in progress, then you can refresh the status periodically by clicking **Refresh**.
- If your import completed successfully, then the status listed is **Completed**.

14. If the import activity completes with errors, then do the following:
   
   a. Click **Generate Log** to display the error message on the macro’s Errors worksheet.
   
   The following figure shows a screen capture of a portion of the Errors worksheet.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Error Message</strong></td>
<td><strong>Sheet</strong></td>
<td><strong>Location</strong></td>
</tr>
<tr>
<td>The parent organization is invalid because it does not match the organization of the specified manager. (HZ-120513) Details: You must either specify a parent organization that matches the organization of the specified manager or leave the Parent Organization field blank to derive the parent organization from the manager value.</td>
<td>Template</td>
<td>A11</td>
</tr>
</tbody>
</table>

b. Click the value in the Location column to navigate to the erroneous record, correct the issue, and click **Submit** again to create a new import job.

15. After the import is completed, optionally click **Generate Log** to save a file that lists the imported sales users.

   The file is saved to the destination folder where you saved the macro. The file path is displayed in a message.
16. Save the macro file with your data for updates at a later time. You can use the macro to make both minor updates such as misspelling of names or to change the sales hierarchy.

17. Now that you have completed creating users, verify the import.

- Navigate to the Manage Users page to verify that your individual users were correctly created with the appropriate resource role and application job roles.
- You can also verify the reporting hierarchy of the user in the Resource Directory.

See the Reviewing the User Hierarchy You Created topic for details.

Reviewing the Resource Hierarchy You Created

Now that you have completed creating users, you can verify the resource hierarchy in the Resource Directory. You can make changes to the user name and other details by editing the user record from the Manage User work area or you can make the corrections in the Excel macro and import again.

Verifying the Resource Hierarchy

To review the resource hierarchy, do the following

1. Sign in as one of the sales users you created.
2. Click Resource Directory in the Navigator.

The Resource Directory page appears.

3. Search for the top user by first name using the Search: Resources panel on the left of the page.
4. Click the user name link in the Search Results.

The application displays the detailed user information in the Resource page. From the Resource page, you can take one of the actions described in the following table. The callout numbers refer to the figure that follows the table.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>View a graphical display of the organization hierarchy for the user.</td>
</tr>
<tr>
<td>2</td>
<td>Upload a portrait of the user</td>
</tr>
<tr>
<td>3</td>
<td>Review the job and abstract roles provisioned to the user on the Roles tab (Current Roles list).</td>
</tr>
</tbody>
</table>
The following figure shows a screen capture of the Resource page highlighting the locations of the different actions.

5. To view a graphical representation of your organization hierarchy, click **Show Reporting Hierarchy**.

The application displays the user and their manager in an expandable hierarchy.
The following figure shows a screen capture of the visual representation of the sample reporting hierarchy.

6. You can view additional levels of the reporting hierarchy by clicking the arrows below or above each user box. Navigation tools on the top left of the page make it possible to zoom in and out.

Correcting User Records

Follow this procedure to edit individual records. You can change the user name, fix spelling errors, and make other changes. Alternatively, you can perform these same edits in the Excel macro and import again.

1. Sign in as a setup user.
2. Navigate to the Manage Users work area.
3. In the Keywords search field, enter the first name of the user.
4. Click Search (the right arrow icon).
5. Click the name link in Search Results.
6. In the Edit User page, you can edit the information about each user. For example, you can:
   - Fix spelling errors
   - Change the user name
   - Change the resource roles and provisioning of job roles
7. Click Save and Close when you are done.
How can I update the sales organization hierarchy?

If the sales organization changes, because of a reorganization, for example, or if you must correct a mistake, then you should make your corrections in the user import Excel macro or in the import file you used for your initial import and import again.

Importing your corrections takes care of many steps that you would have to perform manually in the Manage Resources UI. For example, if a sales representative gets promoted to a manager, then the import automatically end-dates her Sales Representative job role, assigns her the Sales Manager resource role, and automatically provisions her the Sales Manager job role. If a manager moves to a different organization, then her reports are automatically assigned to her manager.

See the Securing Sales guide for more details.
11 Setting Up the Sales Catalog

Setup Overview

You must create a catalog of the products and services your company sells. Your sales agents select from this catalog when entering products in opportunities and leads. The sales catalog is represented as a hierarchy of product groups with individual products.

Read the About the Sales Catalog topic to learn about the sales catalog and the Vision Corp. use case and perform the setups outlined in the following table. The table lists the steps in the recommended order, provides a description of each step, and lists the names of the tasks you can open from the implementation project for each step. You can open all tasks from the Create Sales Catalog folder in your implementation project. For more details and procedures on each task, see the topics referenced in the last column.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>You can set up the product groups in your sales catalog using the UI and by importing them using the product group import macro, as described in the Importing Products and Product Groups section. This guide shows you how to create the product group at the top of your sales catalog, called the root product group, in the UI. Using the UI to create the root is optional. You can import the entire hierarchy, including the root, using the macro. If you are creating the root product group in the UI, then, after you create the root product group, you must record its reference number. You need the reference number to link the imported product groups.</td>
<td>Manage Product Groups</td>
<td>See the Creating the Root Product Group topic in this chapter.</td>
</tr>
</tbody>
</table>
| 2    | Perform the following prerequisite setups for products:  
1. Create the units of measure using the Manage Units of Measure task.  
2. Create a location using the Manage Locations task.  
3. Create the item master organization using | • Manage Units of Measure  
• Manage Locations  
• Manage Item Organizations  
• Manage Administrator Profile Values  
• Manage Spoke Systems | See the Prerequisite Setups for Products section in this chapter. |
<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.</td>
<td>Specify the item master organization you created in system profile Sales Products Item Organization.</td>
<td>In your browser, navigate to support.oracle.com and search for the document.</td>
<td>See the Downloading the Macros for Importing Products and Product Groups topic in this chapter.</td>
</tr>
<tr>
<td>5.</td>
<td>Identify the item master organization as the default organization for import using the Manage Spoke Systems task.</td>
<td>You carry out this task in the Excel macro.</td>
<td>See the Entering Data into the Product Import Macro and Importing topic in this chapter.</td>
</tr>
<tr>
<td>3</td>
<td>Download the two Excel macros you will use to import products and product groups from My Oracle Support (Doc ID 2229503.1).</td>
<td>In your application, navigate to the Products work area and search for each product you want to edit.</td>
<td>See the Verifying Imported Products and Adding Product Images topic in this chapter.</td>
</tr>
<tr>
<td>4</td>
<td>Enter product information in the product import macro and import the products.</td>
<td>You carry out this task in the Excel macro.</td>
<td>See the Entering Data into the Product Group Import Macro and Importing topic in this chapter.</td>
</tr>
<tr>
<td>5</td>
<td>Verify the products you imported in the Products work area and, optionally, add product images.</td>
<td>Manage Product Groups</td>
<td>See the Viewing the Product Group Hierarchy topic in this chapter.</td>
</tr>
<tr>
<td>6</td>
<td>Enter the product group hierarchy and the relationship between the products and the product groups into the product group import macro and initiate your import.</td>
<td>Manage Product Groups</td>
<td>See the Publishing the Sales Catalog topic in this chapter.</td>
</tr>
<tr>
<td>7</td>
<td>Enter the product group hierarchy and the relationship between the products and the product groups into the product group import macro and initiate your import.</td>
<td>Manage Product Groups</td>
<td>See the Viewing the Product Group Hierarchy topic in this chapter.</td>
</tr>
<tr>
<td>8</td>
<td>Validate the sales catalog on the Manage Product Groups page.</td>
<td>Manage Product Groups</td>
<td>See the Publishing the Sales Catalog topic in this chapter.</td>
</tr>
</tbody>
</table>
### About the Sales Catalog

You must create a sales catalog that salespeople use to enter products or product groups the customer is interested in purchasing into opportunities. The sales catalog consists of a hierarchy of product groups, which classifies and organizes the products in your catalog. Optionally, the product groups can include the products you are selling. Each product or product group can include a description and you can add one image for each product. Salespeople can either browse or search the sales catalog to enter the customer product interest in opportunity revenue lines or leads.

You can use product groups as a dimension in your sales territories and for forecasting product revenue. During forecasting setup, you can specify the number of levels in your sales catalog product group hierarchy you want to forecast. For example, Vision Corp. assigns specialists to help close deals on opportunities with the line of green servers the company has just launched.

---

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>You must enable the sales catalog for use by selecting the root node as the &quot;base usage&quot;. This step tells the application which product groups to display in the sales catalog. Each time you make a new assignment of &quot;base usage&quot; to a root product group, you must also run the scheduled process Refresh Denormalized Product Catalog Table for BI. If you do not run the process, then your sales catalog does not appear in the Products territory dimension and you cannot create territories using products. Other applications and reports that use products may be affected as well.</td>
<td>Manage Product Group Usage • Refresh Denormalized Product Catalog Table for BI</td>
<td>See the Making a Sales Catalog Available for Use topic in this chapter.</td>
</tr>
<tr>
<td>10</td>
<td>Enable browsing of the sales catalog while editing opportunities by setting the system profile option Browse Sales Catalog in Opportunities Enabled (MOO_ENABLE_BROWSE_CATALOG) to Yes.</td>
<td>Manage Opportunity Profile Options</td>
<td>See the Enabling Sales Catalog Browsing in Opportunities topic in this chapter.</td>
</tr>
<tr>
<td>11</td>
<td>Sign in as a sales user and validate that your sales catalog shows up in opportunities. This task is not available in the implementation project. You must Navigate to the Opportunity work area and create an opportunity.</td>
<td></td>
<td>See the Validating the Sales Catalog in the Application topic in this chapter</td>
</tr>
</tbody>
</table>
The following figure shows a screen capture of the Browse page, which salespeople get as they browse the catalog. The figure highlights the product group hierarchy in the Browse section (callout 1) and the products with descriptions in the Products section (callout 2).

Salespeople can drill down into the individual product pages to view the product description and an image. The following figure shows a screen capture of the Product Detail page for a sample product consisting of the product name, description, and image. The Details and Specifications tab and the rest of the tabs at the bottom of the page are not part of the Sales Catalog product and are not used.
Products in the Sales Catalog

While you can create a sales catalog with product groups only, you must create products to take advantage of advanced sales features such as price books. You must also use products to enable integrations with other Oracle cloud services, including Oracle Engagement Cloud and Oracle Configure, Price, and Quote (CPQ) Cloud. You can use Application Composer to add fields and perform other modifications to products, a feature not available on product groups.

Products you create are also stored in the Oracle Fusion Product Model, which serves as the master item repository for all front-office cloud services. So, the product you create can be priced and quoted in Oracle CPQ Cloud and serviced in Oracle Engagement Cloud.

The Oracle Fusion Product Model, which is provided free of charge with the different cloud services, provides basic functionality for use in the front-office cloud services. If you are implementing supply chain cloud services or ERP cloud services together with your sales application, then you must license the Oracle Product Hub Cloud Service and set up your items using the UIs and import features of Oracle Product Hub Cloud. You cannot create products in your sales application with enough detail that would make them suitable for back-office supply chain applications. Sales applications do not need to track the physical locations of the items you are selling or shipping, for example, so all products you create in the sales application are created at the Item Master Organization level in the Oracle Fusion Product Model. Only the Oracle Product Hub Cloud includes the ability to manage item classes. All products created in the sales application are created at the default item class and use the Production design phase.

The following figure outlines the role products play in the sales application and related cloud services:

- In the sales application, you can create the products for your sales catalog either individually in the UI (indicated by callout 4 in the figure) or you import products from a file (callout 5).
- The products are created both in the sales application and in the Oracle Fusion Product Model (callout 7).
- You expose the products in the sales catalog (callout 3) by associating them with product groups.
- Salespeople can browse or search the sales catalog from the Opportunity UI (callout 1) and select the products the customer is interested in buying.
- You can price the products using price books (callout 2), or create quotes for them in Oracle Configure, Price, and Quote Cloud (callout 6). Price books and CPQ Cloud require additional integration, so are not covered in this guide. (Although price books are a sales feature, you must integrate them with opportunities using Groovy scripting.)
- The products you create can also be serviced in Oracle Engagement Cloud (callout 8), also not covered here.
- The Oracle Fusion Product Model (callout 7) forms the foundation of the Oracle Product Hub Cloud (callout 10), a powerful product management application designed for supply chain, order management, and inventory tasks, which must be licensed separately. Because the sales application uses less than a dozen of the hundreds of the item attributes that can be captured in Oracle Product Hub, you cannot use the sales UIs or product import if you are implementing Oracle Product Hub Cloud. To create products in Oracle Product Hub Cloud that can be used with
Oracle Supply Chain Cloud or Oracle ERP Cloud (callout 11), you must use the Oracle Product Cloud Hub UI and item import (callout 9).

How You Create a Sales Catalog
To create the sales catalog, you:

1. Create the root product group of the catalog. You can create the product group in the UI or you can import it with the rest of the product groups. You are only required to create the root product group. All the other product groups are optional.

2. Create the products for your sales catalog either in the UI or by importing them.

3. You can import the rest of the product group hierarchy, if any.
4. To display individual products in the sales catalog, you must associate the product groups with the products. You can create the association by editing each product group in the UI and selecting the products it contains. Alternatively, you can create the association between product groups and the products in your import.

Oracle provides Excel macros that you can use to speed up your import of products and the product groups and their associations with the products. These import macros are discussed in the Importing Products and Product Groups section in this chapter.

The following figure shows the Vision Corp. sales catalog structure. The company sells laptops and two types of servers: Green Servers and Sentinel Servers. To create the catalog, Vision Corp:

1. Creates Vision Products as the root product group in the UI.
2. Imports the products using the product import macro.
3. Imports the remaining product groups and their associations with the products using the product group import macro.

The following diagram shows the sample Vision Corp. sales catalog configuration. The sales catalog consists of the root product group Vision Products with two child product groups representing the product types: Servers and Laptops. There are two product groups for the server families: Green Servers, and Sentinel Servers. Each server family includes three server products. The Green Server products are: Green Server 3000, Green Server 6000, and Green Server 9000. The Sentinel Server products are: Sentinel Server 1500, Sentinel Server 3000, and Sentinel Server 7000. The Ultra Laptop product group (a child of the Laptops product group) includes the following products: Ultra Z15 Laptop, Ultra Z17 Laptop, and Ultra ZX15 Laptop.

Creating the Root Product Group

Video

Watch: This tutorial shows you how to create the root product group for your sales catalog in the UI. The content of this video is also covered in text topics.
Procedure

Use this procedure to create the root product group for your sales catalog. You can follow a variation of the same procedure to manually create other product groups or you can import the rest.

To create the root product group:

1. While signed in as a setup user, open the Manage Product Groups task from the implementation project. Alternatively, setup and sales administrator users can search for the task by name in the Setup and Maintenance work area.

The Manage Product Groups page appears. The following figure shows a partial screen capture of the Manage Product Groups page highlighting the View menu (callout 1), the Create icon (callout 2), and the Download to Excel icon (callout 3).

2. Click Create in the Manage Product Groups region.

The Create Product Group page appears.

3. Enter an internal name without spaces in the Name field, for example VisionProducts. This name is not displayed in the catalog.

4. Enter a name that you want displayed in the catalog in the Display field, for example Products.

5. Enter an optional description in the Description field.
6. Make sure the **Active** option is selected.
7. Deselect the **Allow Duplicate Children** option.

**Note:** You must deselect **Allow Duplicate Children** for all product groups because the same product groups cannot appear multiple times in the sales catalog hierarchy.

8. Select the **Root Catalog** check box for the root product group.
9. Click **Save**.
10. Now save the reference number of the root product group you just created for entry in the product group import macro. The reference number links the product groups you are importing to the root product group. To save the reference number, you can download the root product group information as a Microsoft Excel file:
   a. In the left pane of the window, click **View** and select **Columns, Show All** to display all columns.
   b. Click the **Export to Excel** icon and save the Excel file to your desktop. The reference number you need is in column D.
11. Click **Save and Close**.
12. Click **Save and Close** on the Manage Product Groups page.

### Prerequisite Setups for Products

#### Setting Up Units of Measure for Products

You must set up the classes of the units of measure and the units of measure that your sales organization uses to sell and price the products in the sales catalog. For example, if you are selling consulting services where you charge by the hour and the minute, then you must set up Time as the class of the units of measure and create hours and minutes as the units of measure. For goods that are priced by the box and by the unit, you must set up Quantity as the class and box and each as the units of measure. If you are selling and pricing goods by the meter, then you must set up Dimension as the class and create Meters as a unit of measure, and so on.

To set up a unit of measure, do the following:

1. While signed in as a setup user, click **Go to Task** for the **Manage Units of Measure** task in the implementation project or after searching for the task by name in the Setup and Maintenance work area.

   The Manage Units of Measure page appears.

2. To create the class for a unit of measure, do the following:
   a. Click **Manage UOM Classes**.
      
      The Manage UOM Classes page appears.
   b. For each class, do the following:
      i. Click **Add**, (the plus sign icon in Search Results).
      ii. Enter the class code (no spaces permitted), class name, and optional description.
      
      For example, for quantity, enter **QUANTITY** as the **Class Code**, **Quantity** as the **Class Name**.
      iii. Enter a code (three-character limit) and name for the smallest unit you are selling in the **UOM Code** and **Base UOM Name** fields.

      For example, for the class Quantity, enter **Ea** as the **UOM Code** and **Each** as the **Base UOM Name**.
Salespeople use your entry in the name field for entering opportunity quantities.

The following figure shows the Manage UOM Classes page.

3. Click **Save and Close**.

The Manage Units of Measure page appears.

4. You created the smallest unit of measure for each class. Now create any additional units of measure for each class as follows:
   
   a. On the Manage Units of Measure page, click **Add** (the plus sign icon) in Search Results.
   
   b. Enter the code (maximum of three characters) and the name of the unit of measure.

   For example, if your smallest unit of measure for the class Time was Minute, then create Hour as another unit of measure if your organization charges by the hour.

   c. Select a class from the **Class Name** list.

5. Click **Save**.
The following figure shows a partial screen capture of the Units of Measure page with Hour and Minute units of time measure.

6. Click Manage **UOM Standard Conversions**

The Manage UOM Standard Conversions page appears.

7. Enter the conversions for each of the additional units of measure you created as follows:

   a. Enter the UOM name, for example, **Hour**, and click **Search**.

   b. Enter the conversion. For Hour, enter **60** to indicate there are 60 minutes in the hour.

   The following figure shows a partial screen capture of the Manage UOM Standard Conversions page showing the conversion for the hour unit of measure.

8. After you enter all of the conversions, click **Save and Close**.
Creating a Location

You must create a location as a prerequisite for setting up the required item master organization. Because the location isn’t used for any other purpose, you can enter only the minimum information required.

To create the location:

1. Open the Manage Locations task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area. The Manage Locations page appears.
2. Click Create.
3. In the Location Information region Name field, enter any name. For example, HQ.
4. Enter any combination of letters or numbers without spaces in the Code field. For example, HQ.
5. Leave or the other values as they are.
6. Click Submit.
   The application displays a warning informing you that the request will be submitted.
7. Click Yes.
8. Click OK to close the confirmation message.

Creating the Item Master Organization

Because sales products are stored in the Oracle Fusion Product Model, you must create an item master organization as a prerequisite to using products. However, the location of the item master organization and other details are not important because you are not tracking items in inventory.

To set up the item master organization, do the following:

1. While signed in as a setup user, open the Manage Item Organizations task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area. The Manage Item Organizations page appears.
2. Click Create (the plus icon).
   The Create Item Organization page appears.
3. Enter any name in the Name field, for example, Vision Item Master.
   You must select this name when setting the system profile option Sales Products Item Organization in a separate and related task. This name is visible only during setup.
4. In the Organization field, enter any combination of up to 18 uppercase letters and numbers, for example, VISION.
   You must enter this name in the separate and related setup task: Manage Spoke Systems.
5. In the Name field in the Location region, click the down arrow and select Search from the list.
   The Search and Select: Location Details window appears.
6. In the Name field, enter the name of the location you created.
7. Click Search.
8. Select the organization name and click OK.
   The Manage Item Organization Parameters page appears.
10. Make sure the organization name you entered in the previous page (Vision Item Master) is selected in the Item Master Organization list. This selection establishes the organization as the item master.

11. In the Starting Revision field, enter a number. For example, 1. Again, your entry does not matter.

12. Click Save and Close.

13. Click Done.

Specifying the Item Master Organization Used in Oracle Sales Cloud

You must set the Sales Products Item Organization system profile option to the item master organization you just created. Set the system profile option as follows:

1. Open the Manage Administrator Profile Values task from the implementation project or after searching for the task by name in the Setup and Maintenance work area.

The Manage Administrator Profile Values page appears.

2. In the Profile Option Display Name field, enter Sales Products Item Organization.

3. Click Search.

4. Click the name of the profile option in the search results.

5. In the Profile Value field, select the item organization you created from the list.

6. Click Save and Close.

Identifying the Item Master Organization as the Source of Import Data

You must specify the item organization as the default source of the import data for the Product Information Management Data Hub using the Manage Spoke Systems task. Spoke systems (also called source systems) enable users to identify the source of import data.

To identify the item organization using the Manage Spoke Systems task, do the following:

1. Open the Manage Spoke Systems task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.

The Manage Spoke Systems page appears. You can ignore any error message you may receive regarding read permissions.

2. In the Name column in the Search Results region, click the Product Information Management Data Hub link.

The Edit Spoke System: Product Information Management Data Hub page appears.

3. On the Import Options tab, select the item master organization name you created earlier from the Default Organization list. For example, Vision.
The following figure shows a screen capture of the Edit Spoke System: Product Information Management Data Hub page with the Default Organization field highlighted.

4. Click **Save and Close**.
5. Click **Done**.

Importing Products and Product Groups

**Video: Importing Products**

**Watch:** This tutorial shows you how to import product information you can display in your sales catalog using the Excel macro provided by Oracle. The content of this video is also covered in text topics.

Downloading the Macros for Importing Products and Product Groups

To import products and product groups, you must download two separate macros from article Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1) on My Oracle Support. Both macros use the default mappings provided in your application.
Follow these steps to download the files:

1. Sign in to support.oracle.com.
2. Search for 2229503.1.
3. Scroll down in the article to the Details region, locate the section appropriate for your application update, and click on the Product Import Macro and Product Group Import Macro links in the Excel Macro Files column to download the Excel macro files.
4. Save the macro files to separate folders on your computer.
   The application saves import logs to each folder.

## Entering Data into the Product Import Macro and Importing

Follow these steps to enter data into the R13 Product Quick Import Macro and perform the import. You can import up to 5000 product records at a time.

> **Note:** You can modify the macro to import additional fields, including any fields you created. If you modify the macro, then you must create a new mapping to use in your import. The steps for modifying macros are not covered in this guide.

1. Open the R13 Product Quick Import Macro file you downloaded earlier.
2. Make sure macros are enabled in Excel.
3. Do not change the entries in the required Language and Mapping fields. The macro is set up to import product information in US English.
   If you use the macro to import additional attributes not covered in this guide, then you must create your own mapping and enter its number here.
4. On the UOM worksheet, click Populate UOM from Server.
5. On the Login page, enter the following:
   - Host information for your environment. The host name is the portion of the URL of your environment between https:// and /.
   - Your user name
   - Your password
6. Click Submit.
   The macro retrieves the units of measure you set up from your environment and enters them into the worksheet so they are available as the list of values in the Primary UOM field in the Template worksheet.
7. The Product Type worksheet lists the product types you can use to classify your products supplied by Oracle. You can update this list using the following steps. Unless you created new product type values in lookup type QSC_SALES_PRODUCT_TYPE (not covered in this guide), then you can skip this step.
   a. Click Populate Product Type from Server
   b. The Login window still contains the host, user name, and password you entered previously, so click Submit.
      The macro retrieves the latest product types from your environment and enters them into the worksheet so they are available as the list of values in the Product Type field in the Template worksheet.
8. In the Template worksheet, enter your product data. The following table describes the columns. The macro requires just three pieces of information:
   - Product number
The following table provides the details of each attribute:

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Number</td>
<td>You can enter the unique product number of the product or leave this required column blank. If you do not enter a product number, then the macro generates the product number automatically using the date and time. The product number displays in the product records visible in the Products work area and the application uses the product number to identify the product record for updates.</td>
</tr>
<tr>
<td>Name</td>
<td>The product name as it appears in the sales catalog.</td>
</tr>
<tr>
<td>Description</td>
<td>Enter a text description.</td>
</tr>
<tr>
<td>Primary UOM</td>
<td>Unit of measure. One of the values in the UOM worksheet.</td>
</tr>
<tr>
<td>Product Type</td>
<td>Product type. One of the values in the Product Type worksheet.</td>
</tr>
<tr>
<td>Eligible to Sell</td>
<td>If you do not make an entry in this column, then the macro automatically populates the value of Y. A value of Y means the imported product appears in the sales catalog. A value of N imports the product, but does not show it in the catalog or make it available for selection by salespeople.</td>
</tr>
<tr>
<td>Eligible for Service</td>
<td>This column is used only if you are integrating with the Oracle Engagement Cloud. A value of Y enables service requests for this product. If the product is not eligible for service, then enter N. If you leave this column blank, then the macro automatically populates the value of Y.</td>
</tr>
</tbody>
</table>
| Enable Customer Self-Service | This column is used only if you are integrating with the Oracle Engagement Cloud. Enter Y to enable customers to view the product on the self-service portal. Otherwise enter N. If you leave this column blank, then the application populates an N for products of the following product types:  
  - Extended Warranty  
  - Included Warranty  
  - Preventive Maintenance  
  - Service Level Agreement  
  - Software Maintenance  
  You cannot enter a value of Y for these product types into the macro.  
  The macro enters a Y for the rest of the product types supplied by Oracle. You must provide a value for any product types you created. |

9. When you are done with your entries, click **Create Import Activity**.
10. If the **You must correct errors in your entries** message appears, then:
   
   **a.** Click **OK**
   
   The Error worksheet displays your errors.
   
   **b.** Click each error link in column D and make the correction on the Template worksheet.
   
   **Note:** After you correct an error, you must click outside the field for the correction to be recognized.
   
   **c.** Click **Create Import Activity** again.

11. On the Login page, enter the host, user name, and password if required.

12. Click **Submit**.

   The application displays one of the messages listed in the following table:

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted</td>
<td>Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>successfully.</td>
<td></td>
</tr>
<tr>
<td>Unable to connect to the server at this</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>time.</td>
<td></td>
</tr>
<tr>
<td>Unable to submit the file import activity.</td>
<td>You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors work sheet to view the error details.</td>
</tr>
<tr>
<td>Check log for details.</td>
<td></td>
</tr>
</tbody>
</table>

13. If your import activity was submitted successfully, then click **Activity Details**.

   The Activity Details window appears, listing the import activity name, its ID and its status.
   
   - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
   - If your import completed successfully, then the status listed is **Completed**.

14. Optionally, click **Generate Log** to save a file listing the products that were imported.

**Verifying Imported Products and Adding Product Images**

You can verify the products you imported and add images in the Products work area.

To check the products you imported and add images, do the following:

1. While signed in as a setup user, navigate to the Products work area.
2. Search for the product by product number or search by product name as follows:
   
   **a.** Click **Advanced Search**.
   
   The Advanced Search pane opens.
   
   **b.** Click **Add** and select **Name** from the list.
   
   **c.** Enter the product name or the first few letters of the name in the field.
   
   **d.** Click **Search**.
3. Click the product number link for the product
   The Edit Product pages appears.

4. To add a product image, do the following:
   a. Click Manage Attachments (plus sign icon) under the Images heading.
      The Attachments window appears.
   b. Click Choose File and select the image.
      You can only include one image for each product.
   c. Click OK.

5. Click Save and Close.

Entering Data into the Product Group Import Macro and Importing

Follow these steps to enter data into the product group import macro and perform the import. You can import as many as 5000 records at a time.

Note: You can modify the macro to import additional fields, including any fields you created. If you modify the macro, then you must create a new mapping to use in your import. The steps for modifying macros are not covered in this guide.

1. Open the R13 Product Group Quick Import Macro file you downloaded earlier.
2. Make sure macros are enabled in Excel.
3. Do not change the entries in the required Language and Mapping fields. The macro is set up to import product information in US English using the default mapping. If you use the macro to import additional attributes, not covered in this guide, then you must create your own mapping and enter its number here.
4. In the ProductGP_Data worksheet, enter the product groups in your sales catalog hierarchy starting at the top of the hierarchy, right underneath the root product group you created earlier. For each product group, you must enter its parent.

The following table provides the details of each column:

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Group Reference Number</td>
<td>Enter a unique alphanumeric ID up to 50 characters in length. You can enter the product group name without any spaces. For example, if your product group is Green Servers, you can enter GreenServers. The macro enters this value as the Product Group Internal Name for each product group. The Product Group Internal Name is visible in the Manage Product Groups task UIs.</td>
</tr>
<tr>
<td>Product Group Internal Name</td>
<td>Optionally, enter a product group internal name of up to 150 characters in length, which is also visible in the Manage Product Groups task UI. This field is included for customers who may have lengthy internal IDs for their products. If you leave this field blank, the macro copies the Product Group Reference number into this field.</td>
</tr>
<tr>
<td>Product Group Display Name</td>
<td>The name of the product group as it will appear in the sales catalog.</td>
</tr>
<tr>
<td>Product Group Description</td>
<td>Enter a text description. This text is not visible to salespeople while making product selections.</td>
</tr>
<tr>
<td>Parent Product Group Reference Number</td>
<td>Enter the product group reference number for the parent product group. For the product groups directly underneath the root product group you created earlier, you must enter the reference number.</td>
</tr>
</tbody>
</table>
### Column

<table>
<thead>
<tr>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>number you obtain from the application. The root product group reference number is a 15-digit number, for example: 100000011628005. See Creating the Root Product Group topic for details.</td>
</tr>
<tr>
<td>If you did not create the root product group in the UI and you are importing it instead, then enter any unique alphanumeric value.</td>
</tr>
<tr>
<td>A Y value in this column means that salespeople can select the product group when entering a customer’s product interest in opportunity revenue lines. An N value means they cannot.</td>
</tr>
</tbody>
</table>

#### 5. Specify which products appear in which product group on the **ProductGP_Product_Relation** worksheet. To establish the relationship, you enter the product group reference number and the product number you obtain from the product import macro.

#### 6. When you are done with your entries, click **Create Import Activity**.

#### 7. On the Login page, enter the following:

- Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/sales`.
- Your user name
- Your password

#### 8. If the **You must correct errors in your entries** message appears, then:

   **a.** Click **OK**
   The Error worksheet displays your errors.
   **b.** Click each error link in column D and make the correction on the Template worksheet.

   ✍ **Note:** After you correct an error, you must click outside the field for the correction to be recognized.

   **c.** Click **Create Import Activity** again.

#### 9. Click **Submit**.

The application displays one of the messages listed in the following table:

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted successfully.</td>
<td>Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>Unable to connect to the server at this time.</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>Unable to submit the file import activity. Check log for details.</td>
<td>You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors work sheet to view the error details.</td>
</tr>
</tbody>
</table>

#### 10. If your import activity was submitted successfully, then click **Activity Details**.

The Activity Details window appears, listing the import activity name, its ID and its status.

- If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
If your import completed successfully, then the status listed is **Completed**.

11. Optionally, click **Generate Log** to save a file listing the product groups that were imported.

### Publishing the Sales Catalog

Product groups must be published before they are available for use. If you imported any of the product groups in your sales catalog, then the import process automatically publishes all product groups you created and you can skip this step. If you created product groups in the UI and did not import any, then you must manually lock and publish the product groups created in the UI as described in this topic.

**Note:** You cannot delete product groups after they are published. If you make a mistake, then you can inactivate the existing product groups, and create and publish new ones.

To publish the sales catalog:

1. While signed in as a setup user, open the Manage Product Groups task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.
2. Click the task name link in the search results.
3. In the Manage Product Groups page, select the root node of the catalog that you’re going to publish.
4. Click **Lock**.
5. Click **Publish**.

The application publishes all product groups that are locked.

6. Click **Yes** in the Confirm Publish dialog box.
7. Click **OK** on the confirmation message.
8. Click **Save and Close**.

Every time you publish, the application automatically runs the scheduled process Refresh Denormalized Product Catalog Table for BI. This process updates the product group hierarchy in territories, opportunities, and other consuming applications.

### Making Your Sales Catalog Available for Use

To make the sales catalog available for use in opportunities, leads, and territories, you must assign the root of the product group hierarchy to the "Base" usage in the Manage Product Group Usage page and set a few options. You must then run the Refresh Denormalized Product Catalog Table for BI process.

### Assigning the Catalog Root to the Base Usage

1. Sign in as a setup user or as the sales administrator user.
2. Open the **Manage Product Group Usage** task from the implementation project or after searching for the task in the Setup and Maintenance work area.

The Manage Product Group Usage page appears.

3. In the upper portion of the Manage Product Group Usage page, select the **Base** record.
4. In the Details region in the lower portion of the page, click **Select and Add**.
Note: If a product group is already associated with the Base usage, then you must remove the product group first by clicking **Delete**.

5. In the Select and Add: Root Product Groups window, search for the root product group you are assigning to the Base usage.

6. Select the record and click **OK**.

The following figure shows the screen capture of the Manage Product Group Usage page. Callout 1 highlights the Base usage record you select. Callout 2 shows the location of the **Select and Add** icon. Callout 3 shows the Base: Details Product Group tab where the root product group you selected is listed.

7. On the Manage Product Group Usage page, click **Save**.

8. Click the **Miscellaneous** tab and set the following options for sales catalog searching and browsing. You may have to scroll to see all of the options. Some options are repeated multiple times to permit settings for different objects:

   o **Search Product Groups**

   This option determines if you can search product groups and products or just products alone in opportunities and leads:

   - A setting of **Yes** returns both product groups and products. If you're using not using products in your catalog, then you must use this setting.

     When you search for the term **Green**, the application returns all product groups and products with that term in the name or description, such as **Green Servers** (product group), **Green Server 3000** (product), and **Green Server 6000** (product).

   - A setting of **No** (the default setting) returns products only.
When you search for the term `Green`, the application returns only products with that term in the name or description, such as `Green Server 3000`, `Green Server 6000`, and `Green Server 9000`.

- **Show Immediate Child Products Only**

  If you are using products, then this option determines which products display under the Products heading in the Browse Catalog window in opportunities. You can ignore this option if you are not using products.

  - When set to **Yes** (the default setting), you can see only the products within the selected product group.

    Suppose that the product group `Servers` has no products within it, but its subgroups, `Green Servers` and `UltraPro Servers`, each have several products within them. When the user clicks the `Servers` product group in the catalog browse pane, no products display in the Products section.

  - When set to **No** you can also see the products within the subgroups of the selected product group. If you’re using only product groups in your catalog, then this setting has no effect on the browse feature.

    Suppose the product group `Servers` has no products within it, but its subgroups, `Green Servers` and `UltraPro Servers` each have several products within them. When the user clicks the `Servers` product group in the catalog browse pane, all the products contained within the `Green Servers` and `UltraPro Servers` product groups display in the Products section.

9. Click **Save and Close**.

**Running the Refresh Denormalized Product Catalog Table for BI Process**

You must run the Refresh Denormalized Product Catalog Table for BI process to ensure that the sales catalog can be used in consuming applications. For example, if you do not run this process, then you cannot use products as a sales territory dimension. To run the process, open the task **Refresh Denormalized Product Catalog Table for BI** task in the implementation project and click **Submit**.

You can also run this process from the Scheduled Processes UI. If you do, then you must enter a percent sign between the words in the name when searching. For example: **Refresh%Denormalized** (you can enter just the first two words to find the process).

**Validating the Sales Catalog in the Application**

After you have published and enabled your catalog for Oracle Sales Cloud, you can check that the product groups are visible in opportunities.

1. Sign in as a sales manager or salesperson.
2. Navigate to the **Opportunities** work area.
3. Click **Create Opportunity**.

   The Create Opportunity page appears.

4. Enter the opportunity name and click **Save and Continue**.
5. In the Products region, click **Add**.
6. For **Type**, select **Group**.
7. Verify that your product groups display in the **Name** list.
Enabling Sales Catalog Browsing in Opportunities

You can enable salespersons to browse the sales catalog while editing opportunities by setting the system profile option Browse Sales Catalog in Opportunities Enabled. Setting this profile option to Y displays the Browse Catalog button which you can use to browse the catalog on the Edit Opportunity page. While browsing the sales catalog, salespersons can view the product group hierarchy, search for product groups and products, and add any of the product groups or products as opportunity lines.

The following figure highlights the location of the Browse Catalog button on the Edit Opportunity UI.

Setting the Profile Option

1. Open the Manage Opportunity Profile Options task from the implementation project. Alternately, you can open the task from the Setup and Maintenance work area after searching for it by name.

   The Manage Opportunity Profile Options page appears.

2. In the search region, enter Browse Sales Catalog in Opportunities Enabled in the Profile Display Name field.

3. Click Search.

4. In the search results, click on the profile option name link.

5. Set the profile option value to Y.

6. Save your changes.
12 Importing Accounts and Contacts

Importing Accounts and Contacts Overview

After you set up your sales organization, you can import accounts and their contacts. You import the accounts and contacts using separate Excel macro files, first the accounts and then the contacts. Optionally, you can also import account hierarchies, which provide visual representations of the structure of multi-layered organizations. You can import up to 5000 records at a time and must ensure each import completes before you start another.

The import Excel macros and their mapping files are available on My Oracle Support in document Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1). The following table lists the tasks that you perform to complete the imports. You can open many of the tasks directly from the Import Accounts and Contacts folder of the implementation project, as indicated.

Before you start, read the topics in the Account and Contact Import Concepts section.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Download the Excel macro and mapping files from Oracle Support document 2229503.1. The document includes different versions of the files for different application updates. Ensure the names of the files you download include the same update number as your application.</td>
<td>No task for this step.</td>
<td>See the Downloading Macros and Mapping Files topic in this chapter.</td>
</tr>
<tr>
<td>2.</td>
<td>Upload the mapping files into your application and record the mapping numbers for each.</td>
<td>Manage File Import Mappings</td>
<td>See the Uploading Mapping Files and Recording Their Numbers topic in this chapter.</td>
</tr>
<tr>
<td>3.</td>
<td>Optionally, specify which industry classification category you want to use to classify your accounts in the system profile option MOT_ INDUSTRY_CLASS_CATEGORY. By default, the application uses the industry classifications provided by Oracle (CUSTOMER_CATEGORY) but other classification categories, including SIC and NAICS, are available.</td>
<td>Manage Administrator Profile Values</td>
<td>See the Specifying the Industry Classification for Accounts topic in this chapter.</td>
</tr>
<tr>
<td>4.</td>
<td>If you are classifying the accounts by industry in your import, then you must obtain a list of the industry classification codes for the industry category you are using. You enter the codes in the macro file.</td>
<td>Manage Classification Categories</td>
<td>See the Viewing Classification Categories for Accounts topic in this chapter.</td>
</tr>
</tbody>
</table>
## Account and Contact Import Concepts

### About Importing Accounts and Contacts

Although you can create a few test accounts and contacts in the user interface, you will probably want to import some of your existing sales data so that you can test your sales territory assignment and other features.

Importing your account and contact data is a bit more complex than importing users or your sales catalog because customer data such as addresses and contact points are stored in different objects in the application. This means that, in addition to the data itself, you will be adding reference IDs into your file so the application can relate the data you import. For example, to import accounts and their contacts, you will first import the accounts and then use their reference IDs to import their contacts. The reference information you add to each object in the file also permits you to update the information later, if required.

### Information You Are Importing for Accounts

You use accounts to import basic information about the organizations important to your business. This information, which appears in the Edit Account page Account Profile tab in the UI, includes the following:

- **Organization name**
• Account type

The account can be of type customer or prospect. A customer is an account you have sold to in the past.

• Industry classification

• Account owner: the salesperson who owns the account
• Address
• Phone
• Fax
• URL

The following figure shows a partial screen capture of the Profile tab of the Edit Account page. Note that the page includes both the account information listed previously as well as information you must import separately with the contact object (such as the primary contact name, phone, and e-mail) and account hierarchy object (parent account and the View Account Hierarchy link, which users click to gain access to a visual representation of account hierarchies).

Information You Are Importing for Contacts

For contacts, you are importing the basic information about the contact which appears on the Profile tab of the Edit Contact page. The information you can import includes not only the name, address, phone, and other contact information, but also the contact owner and the related account, if any.
The following figure contains a partial screen capture of the Profile tab on the Edit Contact page.

### Edit Contact: JO FOWLER: Profile

About Importing Addresses for Accounts and Contacts

Addresses and other information you import are stored as separate objects in the application. When you import an address, for example, the application creates a location containing the address information, and a site, which provides the link between the location and the account or contact. If you are importing a contact at an existing account address, you can:

- Import the address once with the account and share that address with the contact.

Reusing the account address for the contact is the equivalent of selecting the **Use account address** option when creating the contact in the UI. To reuse the account address, you import the address with the account and reference the address in the contact import file using the location ID you entered in the account import file.
The following figure shows how you can reference the account address in your contact import file by including the location ID you imported for the account.

- You import the same address twice: once for the account, and a second time for the contact.

Doing so creates two locations and duplicate addresses. You must update two addresses in the future if there are changes.
The following diagram shows the two locations with the duplicate address.

You reference the objects such as the organization and the location using reference IDs you include in your import files. The following figure explains how you reference the account and its address in the contact import macro.

- The account import macro includes a unique ID in the Account Number column, which identifies the account. A unique ID in the Address Location OSR column identifies the address.
- In the contact import macro, you enter the account number to link the contact to the account. Entering the ID from the account Address Location OSR column references the account address.
About Account Hierarchies

An account hierarchy provides a visual representation of relationships between accounts. You can use an account hierarchy to represent the structure of accounts in large customers and organizations with multiple layers. The hierarchy need not mirror the formal corporate structure, but can instead represent your organization’s view of your customers. Each account in the hierarchy can have only one parent account.

Capturing account hierarchies can benefit the sales organization in a number of ways:

- Sales people can use the hierarchy to see the position of their account in the hierarchy.
- You can create BI Publisher reports to show revenue for the hierarchy as a whole.
- You can use the hierarchy to provide key account directors and other select managers access to accounts and opportunities in the hierarchy that they cannot access otherwise. Accounts for a large multinational corporation, for example, are typically assigned to sales teams in different countries or regions. Because managers in each region can only access information in their own region, no single manager can access all of the accounts and opportunities for the entire multinational. By including the account at the top of the multinational hierarchy in the territory of a manager, you can provide that manager with edit access to all accounts and opportunities in the hierarchy, regardless of where they are located. Managers get access to the account you include in the territory, and to all the accounts below in the hierarchy, so you can also provide access to a subset of the hierarchy.

The following figure is a screen capture of the hierarchy of the fictitious Pinnacle Technologies company and its four subsidiaries.

You can create and maintain the account hierarchy in the UI, using a link in the Edit Account page Profile tab. Alternatively, you can import the hierarchy as described in this chapter. When no account hierarchy is defined for an account, the link on the Edit Account page displays as Create Account Hierarchy. When the account is part of a hierarchy, the link displays instead as Manage Account Hierarchy.
The following figure shows a partial screen capture of the Profile tab on the Edit Account page, highlighting the location of the Manage Account Hierarchy link.

**Related Topics**
- Viewing and Managing Account Hierarchies topic in the Oracle Sales Cloud Using Sales guide

**Getting Ready**

**Video**

Watch: In this tutorial, you learn how to get ready to import accounts using the Excel macro provided by Oracle. The tutorial shows how to download the macro and the accompanying import mapping file and how to install the mapping. The content of this video is also covered in text topics.

**Downloading Macros and Mapping Files for Account and Contact Import**

You must first download and save the macros and associated mapping files in separate folders on your computer. Create a separate folder for accounts, contacts, and account hierarchy (if you are importing it). The macros save log files to these same folders.

To download the files:

2. Search for 2229503.1.
3. In the Details section of the Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1) document, locate the section appropriate to your application update, and download the files from the Excel Macro Files and Mapping Files columns.

The following table lists and describes the import macros and mapping files for account and contact import.

<table>
<thead>
<tr>
<th>File Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>R13 Account Quick Import Macro</td>
<td>An Excel macro which you populate with the account data that you want to import.</td>
</tr>
<tr>
<td>R13 Account Import Macro Mapping</td>
<td>The mapping the application uses for account import.</td>
</tr>
<tr>
<td>R13 Contact Quick Import Macro</td>
<td>An Excel macro which you populate with the contact data that you want to import.</td>
</tr>
<tr>
<td>R13 Contact Import Macro Mapping</td>
<td>The mapping the application uses for contact import.</td>
</tr>
<tr>
<td>R13 Account Hierarchy Quick Import Macro</td>
<td>An Excel macro which you populate with the account hierarchy data that you want to import.</td>
</tr>
<tr>
<td>R13 Account Hierarchy Member Macro Mapping</td>
<td>The mapping the application uses for step 2 of the account hierarchy import.</td>
</tr>
</tbody>
</table>

4. Save each macro and its mapping file to a folder on your computer.
5. Check to make sure you downloaded the correct versions of the files. The name of each file you downloaded includes the update number. For 18C, use the 18B version of the file because there is no change. For example, R13 Account Quick Import Macro 18B.xlsm indicates that this macro can be used with updates 18B and 18C.

Uploading Mapping Files and Recording Their Numbers

You must upload the mapping file for each macro into the application and record the mapping number. You can either record the number on the Manage File Import Mapping page by hand, or you can drill down on the mapping name and copy the number to your clipboard from the Edit Import Mapping page.

Perform the following procedure to record the mapping ID separately for accounts, contacts, and account hierarchy:

1. While signed in as a setup user, navigate to the Setup and Maintenance work area. Open the Manage File Import Mappings task from the implementation project or after searching for the task by name.

   The Manage File Import Mapping page appears.

2. Click Import Mapping at the top of the page.

3. Click Choose File and select the mapping file and click OK.

   The mapping is now listed at the bottom of the page.

4. You must enter the mapping number into the import macro. You can either record the number on the Manage File Import Mapping page by hand, or you can drill down on the mapping name and copy the number to your clipboard from the Edit Import Mapping page.
Specifying the Industry Classification for Accounts

Use the following procedure to specify which industry classification category you want to use for accounts. The classifications for the category you select appear in the list of values for the Industry field in the Account user interface. The classifications can also be used in the sales territory Industry dimension and to create leads using Sales Predictor rules. By default, the profile is set to CUSTOMER_CATEGORY.

1. While signed in as a setup user, open the Manage Administrator Profile Values task from the implementation project. Alternately, you can search for the task by name in the Setup and Maintenance work area. The Manage Administrator Profile Values page appears.

2. In the Search: Profile Option region, Profile Option Code field, enter MOT_INDUSTRY_CLASS_CATEGORY

3. Click Search.

4. Select the classification category from the Profile Value list. The available values are:
   - 1972 SIC
   - 1977 SIC
   - 1987 SIC
   - CUSTOMER_CATEGORY
   - NACE
   - NAF
   - NAICS_1997
   - NAICS_2002

5. Click Save and Close.

Viewing Classification Categories for Accounts

Use the following procedure to find the account classification codes to use in the account import macro.

1. While signed in as a setup user, open the Manage Classification Categories task from the implementation project. Alternately, you can search for the task by name in the Setup and Maintenance work area. The Manage Classification Categories page appears.

2. In the Search region, enter the classification category name in the Classification Category field. For the default category provided by Oracle, enter CUSTOMER_CATEGORY

3. Click Search.

4. Click the classification category name.

Use the classification codes listed in the Classification Code column on the page for entries in the import macro.
The following figure shows a screen capture of a part of the Classification Category page for the CUSTOMER_CATEGORY provided by Oracle.

**Classification Category: CUSTOMER_CATEGORY**

**Overview**

- Classification Category: CUSTOMER_CATEGORY
- Classification Category Meaning: Industry
- Classification Category Description: High level industrial categories of customers.

**Entity Assignment**

<table>
<thead>
<tr>
<th>View</th>
<th>Detach</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Table Name</th>
<th>Where Clause</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hz_Parties</td>
<td>WHERE PARTY_TYPE = 'ORGANIZATION'</td>
</tr>
</tbody>
</table>

**Classification Codes**

<table>
<thead>
<tr>
<th>View</th>
<th>Detach</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Classification Code Meaning</th>
<th>Classification Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Services</td>
<td>SERVICES</td>
</tr>
<tr>
<td>Media and Entertainment</td>
<td>MEDIA_AND_ENTERTAINMENT</td>
</tr>
<tr>
<td>Metals and Mining</td>
<td>METALS_AND_MINING</td>
</tr>
<tr>
<td>Non-profit</td>
<td>NON-PROFIT</td>
</tr>
<tr>
<td>Real Estate</td>
<td>REAL_ESTATE</td>
</tr>
</tbody>
</table>

5. Click **Done**.

**Entering Data and Importing**
Videos

Entering Data Into the Account Import Macro

Watch: In this tutorial, you learn how to enter account data into the account import Excel macro provided by Oracle. The content of this video is also covered in text topics.

Importing the Accounts

Watch: In this tutorial, you learn how to import the accounts you entered into the Excel macro provided by Oracle and how to verify the import. The content of this video is also covered in text topics.

Entering Data Into the Contact Import Macro

Watch: In this tutorial, you learn how to enter contact data into the import Excel macro provided by Oracle. The content of this video is also covered in text topics.

Entering Data into the Account Import Macro and Importing

You must populate the account import macro with your data and then import the accounts. You can enter a maximum of 5000 records in the macro.

Note: You can modify the macro to import additional fields, including any fields you created. If you modify the macro, then you must create a new mapping to use in your import. The steps for modifying macros are not covered in this guide.

To populate the macro and import accounts:

1. Open the R13 Account Quick Import Macro.
2. If you receive a security warning that macros have been disabled, you must enable macros.
3. The values in the following two fields in the header are preset:
   - **Country Code** is set to US. You can change this setting to another ISO country code if you are importing accounts located in another country.
   - **Class Category** is set to CUSTOMER_CATEGORY. CUSTOMER_CATEGORY is the default account classification provided by Oracle. If you are using another category to classify accounts, such as 1987 SIC or NAICS 2002, then you must select that category in system profile option MOT_INDUSTRY_CLASS_CATEGORY and enter it here. See the Specifying the Industry Classification for Accounts topic in this chapter for details.
4. Enter the mapping number in the **Mapping** field.
5. Click the **Resource EMail to ID Mapping** worksheet.
6. Click **Populate Resource Attributes from Server** to populate the worksheet with information about the resources you will assign as owners of the accounts you are importing.
   
   The Login window appears.
7. In the Login window, do the following:
   a. Enter the host name. The host name is in the portion of the URL between https:// and /sales.
   b. Enter the user name and password.
   c. Click Submit.

8. Click the Template worksheet, and enter the account data in the columns provided.

The following table lists and explains the columns. The address you enter in the Template worksheet becomes the primary address for the account.

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Number</td>
<td>Unique ID for the organization. If you leave this required column blank, then when you import, the macro generates the account number automatically using the date and time. You can also generate this number by clicking Generate Account Number. You must enter the account number to identify the organization when importing additional addresses on the Additional Address worksheet and, in the contact import macro, to link contacts to accounts.</td>
</tr>
<tr>
<td>Account Name</td>
<td>The name of the organization. Entry in this column is required.</td>
</tr>
<tr>
<td>D-U-N-S number</td>
<td>The data universal numbering system (D-U-N-S) number from Dun &amp; Bradstreet Corporation.</td>
</tr>
<tr>
<td>Account Type</td>
<td>Enter either ZCA_CUSTOMER or ZCA_PROSPECT.</td>
</tr>
<tr>
<td></td>
<td>- ZCA_CUSTOMER for organizations you have sold to in the past.</td>
</tr>
<tr>
<td></td>
<td>- ZCA_PROSPECT for potential customers. If an organization still requires qualification, then you should consider importing the record as a lead instead.</td>
</tr>
<tr>
<td></td>
<td>If you leave this column blank, then the macro enters ZCA_PROSPECT.</td>
</tr>
<tr>
<td>Owner E-Mail</td>
<td>Enter the e-mail of the account owner. The e-mail must be one of the e-mail addresses on the Resource EMail to ID Mapping worksheet. Entry in this column is required.</td>
</tr>
<tr>
<td>Address Location OSR</td>
<td>A unique identifier for the address. If you leave this column blank, then the macro generates the number for you when you import.</td>
</tr>
<tr>
<td></td>
<td>If you want to link a contact to the address you import for the organization, then you copy the ID in this column to the Address Location OSR column in the contact import macro.</td>
</tr>
<tr>
<td></td>
<td>If you want to reuse an address from another account, then you can enter the Address Location OSR value from that address and skip the address fields.</td>
</tr>
<tr>
<td>Address 1</td>
<td>Enter the street address for the primary account address.</td>
</tr>
<tr>
<td>Address 2</td>
<td>Enter additional address information, such as the suite number.</td>
</tr>
<tr>
<td>Address 3</td>
<td>This column is hidden in the macro.</td>
</tr>
<tr>
<td>City</td>
<td>City.</td>
</tr>
<tr>
<td>State</td>
<td>For the US, enter one of the two-letter state codes.</td>
</tr>
</tbody>
</table>
Chapter 12
Importing Accounts and Contacts

The following table describes the columns in the worksheet.

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>County</td>
<td>This column is hidden in the macro.</td>
</tr>
<tr>
<td>Province</td>
<td>This column is hidden in the macro.</td>
</tr>
<tr>
<td>Postal Code</td>
<td>Postal code.</td>
</tr>
<tr>
<td>URL</td>
<td>The URL.</td>
</tr>
<tr>
<td>Industry Code</td>
<td>The industry code that you retrieved from the application for the classification category that you are using. You can obtain a list of the codes using the Manage Classification Categories task as described in the Viewing Classification Categories for Accounts topic.</td>
</tr>
</tbody>
</table>

Note: The macro includes additional hidden columns (Column O - Column Z) you can use to import the phone, fax, e-mail, and URL. The application automatically populates the different IDs for these objects (Phone OSR, Fax OSR, and so on).

9. You can import additional addresses for accounts by entering them on the Additional Address worksheet. If you do import additional addresses, then you must:
   - Generate any missing account numbers on the Template worksheet by clicking Generate Account Number before you enter the addresses.
   - Enter account numbers to link the addresses you import to the accounts.
   - Enable the display of the multiple addresses in the UI, as described in the Enabling Display of Multiple Addresses: Explained section of the Implementing Sales guide.

The following table describes the columns in the worksheet.

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Number</td>
<td>Copy the account number from the Template worksheet.</td>
</tr>
<tr>
<td>Address Location OSR</td>
<td>A unique identifier for the address. If you leave this column blank, then the macro generates the number for you when you import.</td>
</tr>
<tr>
<td></td>
<td>If you want to link a contact to the address you import for the organization, then you copy the ID in this column to the Address Location OSR column in the contact import macro.</td>
</tr>
<tr>
<td></td>
<td>If you want to reuse an address from another account, then you can enter the Address Location OSR value from that address and skip the address fields.</td>
</tr>
<tr>
<td>Address 1</td>
<td>Enter the street address for the primary account address.</td>
</tr>
<tr>
<td>Address 2</td>
<td>Enter additional address information, such as the suite number.</td>
</tr>
<tr>
<td>Address 3</td>
<td>This column is hidden in the macro.</td>
</tr>
<tr>
<td>City</td>
<td>City.</td>
</tr>
<tr>
<td>Column</td>
<td>What to Enter</td>
</tr>
<tr>
<td>------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>State</td>
<td>For the US, enter one of the two-letter state codes.</td>
</tr>
<tr>
<td>County</td>
<td>This column is hidden in the macro.</td>
</tr>
<tr>
<td>Province</td>
<td>This column is hidden in the macro.</td>
</tr>
<tr>
<td>Postal Code</td>
<td>Postal code.</td>
</tr>
<tr>
<td>Address Type</td>
<td>You can enter an optional address type for the address. The valid values are:</td>
</tr>
<tr>
<td></td>
<td>◦ SELL_TO</td>
</tr>
<tr>
<td></td>
<td>◦ BILL_TO</td>
</tr>
<tr>
<td></td>
<td>◦ SHIP_TO</td>
</tr>
</tbody>
</table>

10. Click **Create Import Activity**.

The Login window appears already populated with the information you provided.

11. Click **Submit**.

12. If the **You must correct errors in your entries** message appears, then:
   a. Click **OK**

      The Error worksheet displays your errors.
   b. Click each error link in column D and make the correction on the Template worksheet.

   **Note:** After you correct an error, you must click outside the field for the correction to be recognized.
   c. Click **Create Import Activity** and **Submit** again.

13. If the macro data is validated without errors then, the macro displays one of the messages listed in the following table.

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted</td>
<td>Your import has started. If the file import activity is submitted</td>
</tr>
<tr>
<td>successfully.</td>
<td>successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>Unable to connect to the server at this</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>time.</td>
<td></td>
</tr>
<tr>
<td>Unable to submit the file import activity.</td>
<td>You most likely entered the wrong mapping number or the user does not</td>
</tr>
<tr>
<td>Check log for details.</td>
<td>have the correct permissions. Open the Errors work sheet to view the</td>
</tr>
<tr>
<td></td>
<td>error details.</td>
</tr>
</tbody>
</table>

14. If your import activity was submitted successfully, then click **Activity Details**.
The Activity Details window appears, listing the import activity name, its ID and its status.

- If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
- If your import completed successfully, then the status listed is **Completed**.

**15.** Optionally, click **Generate Log** to save a file listing the accounts that were imported.

### Validating the Imported Accounts

You can validate the accounts you imported using advanced search in the Accounts work area as follows:

1. Sign in as a salesperson with the Sales Administrator job role. Sales administrators have broad access to sales data.
2. Navigate to the Accounts work area.
3. Click **Advanced Search** (the filter icon).

The Advanced Search panel appears.

The following figure shows a partial screen capture of the Accounts work area overview page with the Advanced Search panel open. The table lists key features highlighted by callouts in the figure.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Advanced Search</td>
</tr>
<tr>
<td>2</td>
<td><strong>Record Set</strong> field with the operator <strong>Equals</strong> and the record set <strong>All records I can see</strong></td>
</tr>
<tr>
<td>3</td>
<td>Country field with the operator <strong>Equals</strong> and <strong>United States</strong> selected as the country</td>
</tr>
</tbody>
</table>
4. From the Record Set list select **All records I can see**.
5. Add United States or the country you imported as an additional filter as follows:
   a. Click **Add** and select **Country**.
   b. Select the country from the **Country** list.
6. Click **Search**.

The list of accounts for the country appears. After you import contacts, the primary contact is listed in the list as well.

**Entering Data into the Contact Import Macro and Importing**

After you import accounts, you can import their contacts. You can import multiple contacts for each account, but you must specify one of the contacts as the primary contact. The primary contact is listed in the account record. Using the macro, you can import up to 5000 contacts at a time. You must ensure each import completes before starting another.

**Note:** You can modify the macro to import additional fields, including any fields you created. If you modify the macro, then you must create a new mapping to use in your import. The steps for modifying macros are not covered in this guide.
To populate the macro and import the contacts, do the following:

1. Open the R13 Contact Quick Import Macro.
2. Enable macros in Microsoft Excel, if required.
3. The header displays the country code and the default setting is US.
4. Enter the mapping number in the Mapping field.
5. Click the Resource EMail to ID Mapping worksheet.
6. Click Populate Resource Attributes from Server to populate the worksheet with information about the resources you will assign as owners of the accounts you are importing.

The Login window appears.

7. In the Login window, do the following:
   a. Enter the host name. The host name is in the portion of the URL between https:// and /sales.
   b. Enter the user name and password.
   c. Click Submit.
8. Enter the contact information in the Template worksheet. The following table describes the columns:

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Number</td>
<td>Unique ID for the contact. If you leave this required column blank, then the macro generates the contact number automatically using the date and time when you import. The contact number is used to identify the contact for updates.</td>
</tr>
<tr>
<td>Prefix</td>
<td>Enter the contact name prefix. The valid values are:</td>
</tr>
<tr>
<td></td>
<td>• DR.</td>
</tr>
<tr>
<td></td>
<td>• MISS</td>
</tr>
<tr>
<td></td>
<td>• MR.</td>
</tr>
<tr>
<td></td>
<td>• MRS.</td>
</tr>
<tr>
<td></td>
<td>• SIR</td>
</tr>
<tr>
<td>First Name</td>
<td>Contact first name.</td>
</tr>
<tr>
<td>Last Name</td>
<td>Contact last name.</td>
</tr>
<tr>
<td>Job Title</td>
<td>Contact job title.</td>
</tr>
<tr>
<td>Owner E-Mail</td>
<td>Enter the e-mail of the account owner. The e-mail must be one of the e-mail addresses on the Resource EMail to ID Mapping worksheet. An owner is required for every record.</td>
</tr>
<tr>
<td>Work Phone Country Code</td>
<td>Country code for the work phone. If you import a work phone and no mobile phone, then the application displays the work phone as the primary phone in the contact and account UI.</td>
</tr>
<tr>
<td>Work Phone Number</td>
<td>Phone number without spaces.</td>
</tr>
<tr>
<td>Mobile Country Code</td>
<td>Country code for the contact’s mobile phone number.</td>
</tr>
</tbody>
</table>
### Column | What to Enter
--- | ---
| **Mobile Number** | Phone number without spaces. |
| **E-mail** | E-mail address. |
| **Address Location OSR** | If the contact has the same address as the account, then enter the Address Location OSR from the account import macro and leave the rest of the address fields blank. If you are entering a separate contact address, then leave this column blank. The macro automatically generates this ID for you when you import. |
| **Address 1** | Enter a street address unless you are using the account address. |
| **Address 2** | Second address line. |
| **Address 3** | This column is hidden in the macro. |
| **City** | City. |
| **State** | State. |
| **County** | This column is hidden in the macro. |
| **Province** | This column is hidden in the macro. |
| **Postal Code** | Postal code. |
| **Account Number** | The account number links the contact to the account. Copy the account number for the contact's organization from the Account Number column in the account import macro file. If you leave this column blank, then the contact is imported as a standalone contact. |
| **Primary Contact Flag** | Each account must have one and only one primary contact. You must select Y for one of the contacts for each account. The other contacts must have a value of N. |

**Note:** You can modify the macro and the mapping to include additional fields, including ones you created for your application.

9. Click **Create Import Activity**.
   The Login window appears already populated with the information you provided.

10. Click **Submit**.
11. If the **You must correct errors in your entries** message appears, then:
   a. Click **OK**
      The Error worksheet displays your errors.
   b. Click each error link in column D and make the correction on the Template worksheet.
Note: After you correct an error, you must click outside the field for the correction to be recognized.

c. Click Create Import Activity and Submit again.

12. If the macro data is validated without errors then, the macro displays one of the messages listed in the following table: Click Submit.

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted successfully.</td>
<td>Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>Unable to connect to the server at this time.</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>Unable to submit the file import activity. Check log for details.</td>
<td>You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors work sheet to view the error details.</td>
</tr>
</tbody>
</table>

13. If your import activity was submitted successfully, then click Activity Details.

The Activity Details window appears, listing the import activity name, its ID and its status.

- If the import activity is still in progress, you can refresh the status periodically by clicking Refresh.
- If your import completed successfully, then the status listed is Completed.

14. Optionally, click Generate Log to save a file listing the contacts that were imported.

Validating the Imported Contacts

You can view the primary contacts of the accounts you imported from the list of accounts. See the Validating the Imported Accounts topic for details. Alternatively, you can view a list of contacts for the country you imported as follows:

1. Sign in as a sales administrator. Sales administrators have broad access to sales data.
2. Navigate to the Contacts work area.
3. Click Advanced Search (the filter icon highlighted with callout 1 in the following figure).
The Advanced Search panel appears.

4. From the **Saved Search** list select **Contact Name** (callout 2).
5. Add United States or the country you imported as an additional filter (callout 3) as follows:
   a. Click **Add** and select **Country**.
   b. Select the country from the **Country** list.
6. Click **Search**.
   The list of contacts for the country appears.

**Entering Data into the Account Hierarchy Import Macro and Importing**

Use this procedure to import hierarchies of the accounts you imported using the account import macro. You can create multiple hierarchies in each import with a maximum of 5000 records in all.

Importing a hierarchy requires you to run the import in two steps after you enter your data:

- Step 1 creates the hierarchy tree root and the hierarchy structure.
  This step uses the predefined mapping provided in the application, so no mapping number entry is required.
- Step 2 associates the accounts you created with the structure as hierarchy members.
  This step uses the mapping you uploaded to your application, so you must provide the mapping number.

The macro provides two separate buttons to initiate these imports. Both imports use the same data you enter into the macro.

To populate the macro and import the account hierarchies:

1. Open the R13 Account Hierarchy Quick Import Macro.xlsx.
2. Enable macros in Microsoft Excel, if required.
3. In Step 2, **Hierarchy Member Mapping** field, enter the mapping number for the R13 Account Hierarchy Member Macro Mapping.
4. For each account hierarchy you want to import, do the following:
   a. Enter the account at the top of the account hierarchy as follows:
      i. Enter the account number from the account import macro in the **Party Number** column.
      ii. Because this account is at the top of the hierarchy, leave the **Parent Party Number** column blank.
      iii. Enter a name for the hierarchy, for example, **Global**. The hierarchy name must be unique for each account hierarchy. The name is not displayed in the UI.
   b. For every member of the hierarchy, do the following:
      i. Enter the account number from the account import macro in the **Party Number** column.
      ii. Enter the account number for the parent account in the **Parent Party Number** column.
      iii. Enter the hierarchy name you entered for the top of the hierarchy. For example, **Global**.

The following figure shows a screen capture of the macro populated with a sample hierarchy of four accounts underneath the same parent account.

The following table lists the entries for the hierarchy example in the figure.

<table>
<thead>
<tr>
<th>Party Number</th>
<th>Parent Party Number</th>
<th>Hierarchy</th>
</tr>
</thead>
<tbody>
<tr>
<td>AC_ PN_ 170222150805000</td>
<td>This cell is blank for the account at the top of the hierarchy.</td>
<td>Global</td>
</tr>
<tr>
<td>AC_ PN_ 170115010457021</td>
<td>AC_ PN_ 170222150805000</td>
<td>Global</td>
</tr>
<tr>
<td>AC_ PN_ 170115000905012</td>
<td>AC_ PN_ 170222150805000</td>
<td>Global</td>
</tr>
</tbody>
</table>
5. In the Step 1 section, click Create Hierarchy Import Activity.

6. In the Login dialog, do the following:
   a. Enter the Host Name. The host name is in the portion of the URL between https:// and /sales.
   b. Enter the user name and password.
   c. Click Submit.

7. If the You must correct errors in your entries message appears, then:
   a. Click OK
      The Error worksheet displays your errors.
   b. Click each error link in column D and make the correction on the Template worksheet.

   ➨ Note: After you correct an error, you must click outside the field for the correction to be recognized.
   c. Click Create Import Activity and Submit again.

8. If the macro data is validated without errors then, the macro displays one of the messages listed in the following table:

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted successfully.</td>
<td>Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>Unable to connect to the server at this time.</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>Unable to submit the file import activity.</td>
<td>You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors work sheet to view the error details.</td>
</tr>
</tbody>
</table>

9. If your import activity was submitted successfully, then click Activity Details.

The Activity Details window appears, listing the import activity name, its ID and its status.
   o If the import activity is still in progress, you can refresh the status periodically by clicking Refresh.
   o If your import completed successfully, then the status listed is Completed.

You are now ready to import the association between the hierarchy nodes and accounts.

10. In the Step 2 section of the macro header, click Create Hierarchy Member Import Activity. The Login window appears listing the host name, user name, and password you entered in Step 1.

11. Click Submit.

12. You can monitor the progress of your second import activity, the same way you did in step 1.
Validating the Imported Account Hierarchies

You can validate the import and view the hierarchies you imported in the UI. The user doing the validation must be a sales administrator, the account owner, be on the account team, or manage someone who is on the account team.

1. Sign in as a sales administrator. Sales administrators have broad access to sales data.
2. Navigate to the Accounts work area.
3. Search for and open the parent account to edit it.
4. Click the Profile tab.
5. Click the Manage Account Hierarchy link to view the details of the imported account hierarchy members.

The following figure shows a screen capture of the Edit Account page Profile tab highlighting the Manage Account Hierarchy link.
13 Setting Up Sales Campaigns

About Sales Campaigns

Sales campaigns make it easy for salespeople to keep their contacts informed, announce product launches, and invite them to events. You can configure HTML e-mail templates that salespeople can use to send e-mails using the built-in e-mail server that the application provides. The application monitors responses and can create follow-up tasks or send e-mails to the sales campaign owners. The following figure outlines the sales campaign process.

1. Sales administrators create an HTML template referencing images stored separately on a public server.

   You can include merge fields, links (URLs), and three predefined response links provided by Oracle. Using the predefined response links, contacts can request a call-back, request more information, or fill out a form to have the e-mail sent to others.

2. Salespeople use the template to create a sales campaign and select the contacts they want to e-mail.

3. For each sales campaign, salespeople can modify the template, add messages for each recipient, and have the application generate follow-up tasks or e-mails.

4. Salespeople can have the sales campaign e-mails sent either immediately after clicking Submit or at the specified date and time.

5. When contacts open the e-mail, click a URL or one of the response links, the application records their responses.

6. The application creates a task for each response or sends a notification e-mail, depending on campaign setup.

7. The sales campaign owner reviews the sales campaign responses and can convert them into leads.
8. Salespeople can review the tasks generated by the sales campaign in the Activities work area.

Setup Overview

The following table outlines the steps required to set up and test sales campaigns. Details for individual steps are provided in the topics that follow.
### Creating a Sales Campaign Template

Sales administrators can create templates that salespeople can use and edit for their sales campaigns. You can create a sales campaign template either from scratch or by copying one of the predefined templates provided by Oracle.

To create a sales campaign template, do the following:

1. While signed in as a setup user, open the **Manage Marketing Treatment Templates** task from the implementation project. Alternatively, search for the task by name in the Setup and Maintenance work area.

   The Manage Marketing Treatment Templates page appears listing the available templates.

2. If you want to use an existing template as your starting point, then do the following:
   
   a. Click the template name link and then select **Duplicate** from the **Actions** menu.

      The application copies the template.

   b. Select the template copy and click **Edit**.

      The Edit Treatment page appears.

3. If you want to create a template from scratch instead, then click **Create**.

   The Create Template page appears.

4. In the **Name** field enter the template name salespeople see while creating a sales campaign.
5. You can use some of the other fields at the top of the page for the following:

   - Upload an HTML file to serve as the basis of your e-mail body using the **Upload File** field. Uploading a file replaces the current template content.
     
     Any images must be hosted on a public server and include their absolute URLs in the `src` tags. The HTML you upload must contain only the body of the HTML document. You omit the header information.
     
     The rich text editor provided in the UI is not an HTML editor, so you are better off creating your template outside the application. For example, you cannot use the rich text editor to insert images. You must insert image URLs in the HTML directly.
     
   - Remove a template from use by deselecting the **Active** option.

6. Edit the e-mail body.

The following table explains some of the editing options available on the page. The callout numbers refer to locations in the figure which follows.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Editing Option</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click <strong>Source</strong> to switch between the rich text editor and the raw HTML. You can use the raw HTML view for pasting in HTML that you have prepared in another editor, but the raw HTML is displayed in one block.</td>
</tr>
<tr>
<td>2</td>
<td>Use the rich text editor toolbar for editing text, for inserting URLs that are automatically tracked by the application when contacts click on them, and for other minor changes. URLs for images in the template must be inserted into the HTML itself.</td>
</tr>
<tr>
<td>3</td>
<td>Use the help icon to access the user guide for the rich text editor. The editor is a separate product licensed by Oracle and not all of its features are supported.</td>
</tr>
<tr>
<td>4</td>
<td>Use the first row of buttons, the Element buttons, to insert merge fields and links the e-mail recipients can click to request more information, request a follow-up call, or forward the information to friends.</td>
</tr>
<tr>
<td>5</td>
<td>Use the second row of buttons to insert content which appears in the e-mail only when the conditions you specify are met. For example, you can insert different blocks of text for e-mails to different cities.</td>
</tr>
</tbody>
</table>
7. Click **Save and Close**.

**Template Editing Options**

Inserting Links for a Call Back, for More Information, and for Forwarding to Others

You can insert three predefined links that e-mail recipients can click to indicate that they want a callback, receive more information, or have the e-mail sent to others. The application automatically tracks the responses and can create follow-up tasks or send e-mail reminders.

**Request Call Back and Request More Information**

When an e-mail recipient clicks the **Request Call Back** or the **Request More Information** links, the browser displays a simple message: **Thank you for your interest. Your request has been received and you will be contacted shortly.** At present, the contents of the message cannot be changed.

**Forward to Friend**

Clicking the **Forward to Friend** link displays a browser window where the contact can enter the names and e-mail addresses of up to four recipients and an optional message. The application sends the sales campaign e-mail to the recipients. The forwarding message is displayed wherever the template designer inserted the **${Standard.ForwarderMessage}** merge field.
The following figure shows a screen capture of the Forward to a Friend window. It includes a text field for entering a personal message, and fields to enter the names and e-mail addresses of four friends.

![Screen capture of the Forward to a Friend window]

Enter a personal message *(optional)*

Enter your friends’ names and corresponding email addresses here:

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click to Send

If the new recipients respond, they are automatically created as contacts in the application.

### Adding the Predefined Response Links to the Template

To insert one or more of the predefined response links, do the following:

1. While editing the template in the rich text mode, place your cursor at the location where you want the link to appear.
2. Click the **Element** combo box and select **Response Forms** from the list.
3. Click the adjacent **Element** combo box and select one of the valid three options:
   - Forward to Friend
   - Request Call Back
   - Request More Information

4. Click **Insert** on the same row.

   The application displays the link.

5. If you inserted Forward to Friend, then you must also insert the merge field that displays the forwarding message:
   - Place your cursor at the location in the template where you want the forwarding message to appear.
   - Click the **Element** combo box and select **Merge Fields** from the list.
   - Click the adjacent combo box and select **Standard**.
   - Click the third combo box and select **Forwarder Message**.
   - Click **Insert** on the same row.

      The application displays the merge field `\${Standard.ForwarderMessage}` in the template.

### Inserting Personalized Text and Other Merge Fields

You can insert merge fields to display contact and sales campaign attributes and to enable the manual entry of personalized text to each recipient. To insert the personalized text merge field and other merge fields, do the following:

1. While editing the template in the rich text mode, place your cursor at the location where you want the merge field to appear.
2. Click the **Element** combo box and select **Merge Fields** from the list.
3. Click the adjacent combo box and select the merge field category:
   - Contact
   - Campaign
   - Standard

   The standard category includes the **Personalized Text** merge field, which permits the entry of personalized text for recipients, and the **Forwarder Message** merge field for use with the **Forward to Friend** link. The Forwarder Message merge field displays the message entered by a contact after they click the link.

4. Click the next combo box and select the merge field.
5. Click **Insert** on the same row.

   The application inserts the merge field in the text.

### Inserting URLs Into Sales Campaign Templates

The application automatically tracks clicks on the URLs you insert into sales campaign templates. You must use the enter link function in the rich text editor or insert a URL in the HTML directly.

If you are inserting the URL into the HTML directly, then it must be tagged correctly. Here is an example:

```html
<a href="http://oracle.com">Oracle</a>
```
Adding Conditional Content

Conditional content provides the ability to present relevant information to individual email recipients without having to create multiple messages. There are two ways to generate conditional content within a sales campaign template:

- Block statement personalization
- If-Then-Else personalization

Conditional content and merge fields are available in both HTML and Text format emails.

Block Statement Personalization

Blocks determine whether to insert a block of text or HTML into an outgoing email by comparing one string to another:

- If the two strings are identical, the block is inserted.
- If the two strings are not identical, the block is not inserted.

Note: The string comparison is case sensitive.

The following table lists components of the block personalization element.

<table>
<thead>
<tr>
<th>Personalization Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$(DefineBlock &quot;MatchString&quot;)</td>
<td>Starts a block of text or HTML that is inserted in place of an Insert Block component when MatchString is identical to the MatchString of the Insert Block component.</td>
</tr>
<tr>
<td>$(EndBlock)</td>
<td>Ends a block of text or HTML that was started with the Define Block component.</td>
</tr>
<tr>
<td>$(InsertBlock &quot;MatchString&quot;)</td>
<td>A block of text or HTML is inserted at the location of this component when MatchString is identical to the MatchString of a Define Block component.</td>
</tr>
</tbody>
</table>

The following is an example of a block personalization element:

```
You live in $(InsertBlock "${Account Country}").
$(DefineBlock "USA") <B>the United States.</B>
$(EndBlock)
$(DefineBlock "India") <B>India</B>
$(EndBlock)
```

In this example, if USA is entered in the Country field of the Account record, the following sentence appears:

You live in the United States.

If a given recipient has no associated value for a block variable listed in the InsertBlock MatchString component, then nothing is inserted into the message for that block.

Inserting a Block Statement

To insert a block statement, do the following:

1. Display the email template in the HTML editor.
2. Place the cursor in the location where you want to insert the block.

3. Create the Insert Block statement as follows:

   o In the editor toolbar, select **Insert Block** from the rule conditions drop-down list.
   
   o In the next drop-down list, select the record the field comes from: Contact, Account, or Campaign.
   
   o In the next drop-down list, select the field in the record.
   
   o Click **Insert**.

4. Create a Define Block component as follows:

   o In the drop-down list immediately within the email tag, select **Create Block**.
   
   A **$(DefineBlock "")** and **$(EndBlock)** statement appear in the text.
   
   o Type a field value within the quotation marks of the **$(DefineBlock "")** statement.
   
   This is the value that drives the content displayed in the block.
   
   o Type the text that you want to insert into the email between the **$(DefineBlock "")** and **$(EndBlock)** tags.

5. Repeat Step 4 until you have added all the **Define Block** components that you need.

If-Then-Else Personalization

If-Then-Else personalization provides the ability to insert or remove text within your email content, based on whether a Merge field value is defined. The merge field is defined if it contains a value or, for numeric merge fields, if the value is not 0 (zero).

- If the merge field is defined, the text remains in the outgoing email.
- If the merge field is not defined, the text is removed from the outgoing email.

The following table lists components of the If-Then-Else personalization element.

<table>
<thead>
<tr>
<th>Personalization Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>$(if {Record.FieldName})</td>
<td>The If component is used to start an If-Then-Else personalization element. It determines whether the merge field named [FieldName] has a value. If there is a value for [FieldName], the text between this If-Then-Else component and the next If-Then-Else component is not removed from the email.</td>
</tr>
<tr>
<td>$(elseif {Record.FieldName})</td>
<td>Ends a block of text or HTML that was started with the Define Block component.</td>
</tr>
<tr>
<td>$(else)</td>
<td>The Else component is used after a $(if) or $(elseif) component. If the preceding $(if) or $(elseif) component removes the preceding block of text or HTML from the email, the $(else) component’s block of text or HTML is included in the email. If the preceding $(if) or $(elseif) component does not remove its block of text or HTML, the $(else) component’s block of text or HTML is not included in the email.</td>
</tr>
<tr>
<td>$(endif)</td>
<td>The End-If component closes the If-Then-Else personalization element.</td>
</tr>
</tbody>
</table>

The following is an example of an If-Then-Else personalization element:

```
$(if ${Contact.First Name})
    Dear ${Contact.First Name}${Contact.Last Name},
$(else)
    Dear Mr. or Ms. ${Contact.Last Name},
```

ORACLE
• If the Contact.First Name field is defined, the email begins with “Dear First Name Last Name”.
• If the Contact.First Name field is not defined, the email begins with “Dear Mr. or Ms. Last Name”.

You can use If-Then-Else statements similarly to block statements, by including operators such as Equal to, Starts with, or Contains. You can select these operators from a drop-down list when you generate If or If-Else statements. Unlike blocks, this permits you to insert conditional content where the variable is true or not true.

For example, to modify the email with a condition for accounts in the state of California, you use the following statement:

$\text{(if } \text{${Account.Bill to State} \text{== "CA"}) Join us all month long for special events and workshops held in each of our California locations.}$ 

$\text{(else) Join us all month long for weekly online workshops and special offers at www.mycompany.com/events.}$ 

$\text{(endif)}$

You can also nest If-Then-Else statements, placing one within another.

\textbf{Note:} The components of personalization elements must be placed in the correct locations in the text. Any incorrect placement causes an error.

Inserting an If-Then-Else Personalization Statement

To insert an If-Then-Else statement, do the following:

1. Display the email template in the HTML editor.
2. Place the cursor in the location where you want the If-Then-Else statement.
3. Create the If or ElseIf statement as follows:
   - In the editor Toolbar, from the drop-down list, select either If Or ElseIf.
   - In the next drop-down list, select the record the field comes from: Contact, Account, or Campaign.
   - In the next drop-down list, select the field in the record.
   - In the next drop-down list, select the operator.
   - In the next text box, enter the value that the field is compared with.
   - Click Insert.
4. Following the If or ElseIf statement, enter the text that appears if the condition in the statement is satisfied.
5. At the end of the entire If-Then-Else statement, enter $\text{(endif)}$.

Related Topics

- Sales Campaign Content: Explained
- How Standard URLs and Marketing Content Fit Together

Specifying the Default Sales Campaign Template

Use this procedure to specify the default sales campaign template. Salespeople can select any of the other active templates when creating sales campaigns.

1. From the implementation project, open the Manage Marketing Profile Options task. Alternatively, you can search for this task in the Setup and Maintenance work area.
The Manage Marketing Profile Options page appears.

2. Enter Allow Treatment Template in the Profile Display Name field.
3. Click Search.
4. Select the profile in the search results and select the default template from the Profile Value list.
5. Click Save and Close.

Testing Sales Campaign Setup

You can test your template and the rest of your sales campaign setup by following the steps in this topic. To test sales campaigns, you:

1. Create a sales campaign using the template you created and create yourself or others in the implementation team as contacts.
2. Review the e-mail sent by the campaign and respond by clicking one or more of the response links. Your e-mail client must allow remote content if you want the sales campaign register that you opened the e-mail. You can enable allow remote content in messages either message by message or through a global setting. The remote client setting does not affect the recording of the other responses in the body of the e-mail.
3. Navigate back to the Sales Campaign work area and review the responses. You can review any tasks that were automatically generated by navigating to the Activities work area.

Creating the Test Sales Campaign

1. Sign in using a test account you created for a sales manager or a salesperson.
2. Navigate to the Sales Campaigns work area.
3. Click Create Campaign.
   The Create Sales Campaign: Select Contacts page appears. This page is the first of three in the sales campaign creation process.

   The following figure shows a screen capture of a portion of the Create Sales Campaign: Select Contacts page highlighting the Add Contacts button.

4. Because this is a test, you must first create yourself or other members of the implementation team as contacts at one of the accounts:
   a. Click the Add Contacts button highlighted in the figure.
      The Add: Contacts page appears.
The following figure shows a partial screen capture of the Add: Contacts page. Callout 1 shows the location of the Record Set field where you select an operator and the record set. Callout 2 points to the location of the Create Contact button.

On the Add Contacts page, you can select contacts from previous campaigns, search for contacts by name, or create contacts.

If you search for existing contacts by name, consider selecting a broad record set from the Record Set list.

b. Click Create Contact.

The Create Contact page appears.

c. Enter the test contact name and e-mail address.

d. Optionally, select an account.

e. If your template includes merge fields from the contact address, then you must enter the address or select the Use Account Address option.

f. Click Save and Close.

The Add: Contact page now shows the contact you created.

5. Select the Select option.

6. Click Apply to add the contact to the sales campaign and continue adding other contacts, or, if you are done, click OK.

You are returned to the Create Sales Campaign: Select Contacts page which now lists the contacts you selected.

7. Click the right arrow or the Design E-Mail link.

The Create Sales Campaign: Design E-Mail page appears showing the campaign template you selected as the default.

8. The From field displays the sender’s e-mail address. You can edit the address to show the recipient name, for example: George White <george.white@oracleleads.com>.

9. In the Subject field, enter the e-mail subject the recipients see.

10. You can modify the e-mail body text using the rich text editor. The following table explains additional actions.
What You Can Do | How to Do It
--- | ---
Select a different template | Click Actions, select Change Template and scroll through the thumbnails of the available templates.

Insert contact merge fields | Click Insert Elements and select Merge Fields from the Show list.

Add the Personalized Text or Forwarded Message merge fields. | Click Insert Elements and select Merge Fields from the Show list.

The Personalized Text merge field lets you enter personal text for each recipient. The Forwarder Text merge field displays any text the e-mail recipient enters after clicking the Forward to Friend link.

Add additional response forms, the links recipients can click to request a call-back, request more information, or have the e-mail sent to others. | Click Insert Elements and select Response Forms from the Show list.

11. If the e-mail body includes the Personalized Text merge field, \${Standard.PersonalizedText}, then you can enter personalized text to any of the recipients as follows:

   a. Click Actions and select Personalize Message.
      The Personalize Message window appears.
   b. Click Personalize for a recipient.
   c. Enter the text in the Personalize Message window.
   d. Click OK.
   e. Click Done after you enter all of the personal messages.

      The text appears in the e-mail wherever you inserted the \${Standard.PersonalizedText} merge field.

12. Click the right arrow or select Wrap Up link to display the Create Sales Campaign: Wrap Up page.
13. In the Name field, enter the campaign name. This name identifies the campaign in the list of campaigns and in follow-up actions, e-mails, and leads.
14. If you inserted one of the response forms or if the template includes a URL, then in the My Follow-Up Actions region, select either Create Call Back Task or Receive E-Mail Notification.
15. In the Launch Date region, you can leave the Immediately option selected.
16. Click Submit.
      The application returns you to the Sales Campaign work area page where you can search for campaign or view campaign lists.
17. You can see if the campaign has completed by selecting the My Completed Campaigns list.

Review Responses

1. While still signed in as the campaign creator, display the My Completed Campaigns list and click the campaign name link in the Sales Campaign work area.
The campaign does not appear on this list until after the e-mails are sent. If you want to view the current status of the campaign in progress, then you must search for it by name.

The Sales Campaign Summary page appears showing the responses for the campaign, including the number of contacts who opened the e-mail. The **Opened E-Mail** statistics counts only those contacts who allowed remote content when they opened the e-mail.

The following figure shows a partial screen capture of the Sales Campaign Summary page.

2. Click the individual statistics in the Customer Responses column to display more details and the individual contact names.

3. Click the **Responses** tab to review the details of all the responses.

   The tab shows the names of the responders, their accounts, the type of response (such as a call-back request), the response dates, and e-mail review statuses.

   If you included the Forward to Friend response form in your sales campaign, and the e-mail was sent to additional individuals who responded, then these individuals are created as standalone contacts.

4. From the **Responses** tab, you can convert the responses to sales leads by selecting the response and clicking **Convert to New Lead**. The converted leads are displayed in the **Leads** tab.

5. If you specified that you wanted a task to be created based on a response, then:

   a. Navigate to the **Activities** work area.

   b. Click the **My Tasks** tab.

      The tab lists the tasks created from the campaign. These task subjects are: Sales Campaign Response Generated Task.

   c. Click the **Sales Campaign Response Generated Task** link to view the task details. All of the tasks are the same unless you added your own fields to the task page to display the campaign name.
## 14 Setting Up Sales Territories and Assignment

### Setup Overview

This chapter explains how to set up sales territories and how to use those territories to assign the right people to manage accounts and opportunities. Setting up sales territories is required for forecasting, even if you do not use assignment or have purchased a license that does not include sales territories.

Start by reading the About Sales Territories and Assignment and How Sales Territories Support Assignment and Forecasting topics to get the context for your setups. The Sales Territory Use Cases sections introduces techniques you can use to handle different sales territory use cases. The rest of the topics outline the steps for setting up sales territories and assignment for use cases that are similar to the Vision Corp. use case.

The following table outlines the setup tasks and references the procedures with step-by-step instructions. You can open the setup tasks from the Set Up Sales Territories folder in the implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>If you are setting up territories based on geography, like Vision Corporation, then you must enable the geographical elements that you plan to use during territory setup.</td>
<td>Manage Territory Geographies</td>
<td>See the Specifying Geography Elements for Territory Setup topic in this chapter for details.</td>
</tr>
<tr>
<td>2</td>
<td>Enable the territory dimensions you plan to use in your territories.</td>
<td>Enable Dimensions and Metrics</td>
<td>See the Enabling Territory Dimensions topic for details.</td>
</tr>
<tr>
<td>3</td>
<td>Create a territory proposal. A proposal is a sandbox that permits you to update territories without affecting any existing territory setup.</td>
<td>Manage Territory Proposals</td>
<td>See the Creating a Territory Proposal topic for details.</td>
</tr>
<tr>
<td>4</td>
<td>Create the hierarchy of sales territories in the proposal starting with the top territory and working your way down. You can get an overview of some of the techniques you can use for the setup in the Sales Territory Use Cases section.</td>
<td>Manage Territory Proposals</td>
<td>See the Creating the Sales Territory Hierarchy topic for details.</td>
</tr>
</tbody>
</table>
### Step | Description | Task Name | Where to Get More Details
--- | --- | --- | ---
5 | **Note:** If you plan to use forecasting but did not purchase a license for sales territories, then set up your territory structure as described in the Setting Up Sales Territories When You Use Forecasting Only or Don’t Have a License for Sales Territories topic. Activate the territory proposal. | Manage Territory Proposals | See the Activating the Territory Proposal topic for details.
6 | Optionally, enable automatic assignment of territories to opportunities when they are updated. By default, the application automatically assigns sales territories to accounts whenever an account is created or updated, but sales users must trigger opportunity assignment manually while editing an opportunity or wait for the opportunity assignment process to run. Oracle sets manual assignment for opportunities as the default behavior to prevent performance issues for companies with large number of opportunities (100,000 and up). If your organization, like Vision Corporation, does not have such a large volume, you can have the application assign the opportunity automatically by setting the profile Assignment Submission at Save Enabled to Yes. A setting of Yes is also recommended for forecasting. | Manage Opportunity Profile Options | See the Making Opportunity Assignment Automatic topic for details.
7 | Run the account and opportunity assignment processes (Request Account Assignments Process and Request Revenue Territory Based Assignment) immediately after setting up sales territories and on a regular schedule, perhaps once every day during off-peak hours. | - Request Account Assignments Process  
- Request Revenue Territory Based Assignment | See the Running the Account Assignment Process and the Running the Opportunity Assignment Process topics for details.
About Sales Territories and Assignment

Assignment using sales territories provides additional access to sales data to territory owners. Sales territories also provide the framework for forecasting. Salespeople can forecast only opportunity lines in their territories and forecasts roll up the territory hierarchy.

Default Levels of Access to Sales Data by Salespeople and Sales Managers

By default, salespeople with the Sales Representative and Sales Manager job roles provided by Oracle have limited access to sales data. How much access they have depends on the object:

- **Leads**
  
  Leads can be viewed and edited only by the lead owner, the members of the sales team, the person who imports leads, their managers, and the sales administrator.

- **Accounts**
  
  All salespeople can view basic account information, including customer names, contacts, and addresses, but you must have additional access to view the opportunities on the account, and share all the details you need to collaborate during the sales process, including customer interactions, to-do lists, and appointments. Without additional access, you cannot participate in social discussions, share collateral, and collaborate on presentations.

  If you implement Outlook or Mobile, then only the accounts that are part of a salesperson's territory are downloaded when synchronizing.

- **Opportunities**
  
  Salespeople cannot automatically view opportunities unless they are granted additional access using one of the methods listed in the following section.

For details about the levels of access to each object, see the Data Sharing Mechanisms and Object Visibility chapter of the Securing Sales guide.

How You Gain Additional Access to Sales Data

You gain additional access to sales data in any one of six ways:

- **You are the owner of the record.**

  Each record must have an owner. You automatically become the owner of any record you create. The owner, who is automatically a member of the sales team, has full privileges, including the ability to edit the record and add others to the sales team. The record owner or the sales administrator can reassign ownership of individual records. The sales administrator can also reassign ownership of multiple records at the same time using the Mass Transfer feature available in the Navigator. Users converting a lead to an opportunity, can also assign the owners of the resulting accounts and opportunities.

- **You are a member of the sales team on the record.**

  The owner can add members and assign different levels of access to them: view only, edit, or full (the ability to add others).

- **You are a member of a territory assigned to the record.**

- **You manage someone who is the record owner, on the sales team, or in a territory assigned to the record.**
Managers in a salesperson’s management hierarchy have automatic visibility to their team's set of accounts, contacts, leads and other information. They don’t have to be explicitly assigned to each territory or sales team.

- You are a sales administrator (a user with the Sales Administrator job role).
  
  Sales administrators have access to everything.

- Your implementation team configures and assigns job roles with different privileges.
  
  You can change the default access levels, by copying and modifying the existing job roles. See the Creating Job, Abstract, and Duty Roles chapter of the Securing Sales guide for more details.

Automating the Process of Assigning Additional Access

You can provide additional access to a record by manually reassigning record ownership or adding someone to a sales team, or you can automate the process using one or both of the following methods:

- By setting up sales territories
  
  You can set up the sales territory boundaries based on a wide variety of factors, called dimensions. The most common dimensions include geography, products, customer size, customer type, and industry. Many Oracle customers also define their own additional dimensions.

  When you assign salespeople using territories, the territories themselves become associated with the account, opportunity, or lead. If you later realign your sales territories or if there is a turnover in your sales organization, then the assignments reflect those changes automatically after you run the assignment process.

- By creating assignment rules
  
  Rules assign the individual salespeople you specify to sales teams if the rule conditions are met. Rules are the primary way of assigning salespeople to leads, and so rule setup is covered in the Setting Up Leads chapter. For opportunities, you can create rules to assign additional salespeople using factors that are not covered by sales territories, such as deal size or product knowledge. Creating rules to supplement territory assignment requires additional setup, including the setting of system profile options not covered in this guide. See the Implementing Sales guide for details.

Salespeople can trigger assignment manually or you can assign leads, accounts, and opportunities automatically by running assignment processes.

About Defining Sales Territory Boundaries

The sales territory boundaries are defined by the values you assign to their dimensions.

For accounts, the territory dimensions provided by Oracle include:

- Geography
  
  You can define territories at the level of granularity that is meaningful for your business. For example, for the US you can create the territory geographies at the state level or county level. You can define boundaries at the ZIP Code level, but this should be used sparingly since the complexity is challenging for ongoing maintenance.

- Account type
  
  The account type designates the customer designated as named or not named. This dimension is only available for customer-centric territories.
• Customer size
• Industry
• Organization type

You can also create classification categories to define up to three additional dimensions.

Because opportunities are associated with an account, you can use the account dimensions to assign opportunities as well. Opportunities and leads have these additional dimensions:

• Business unit
• Product
  You can enter product groups or individual products from the sales catalog.
• Sales channel
  The available sales channels are Direct, Indirect, and Partner.

How Sales Territories Support Assignment and Forecasting

This topic explains how the principles of sales territory assignment using a simple example and discusses how territories are used in forecasting.

Sales Territory Assignment

Sales territory assignment matches the values you enter in the territory dimensions to the records you are assigning. The application:

1. Evaluates all territories regardless of their position in the sales territory hierarchy to see if there is a match.
2. Discards the ancestors of any of the matching territories.

To illustrate how sales territories work in assignment and forecasting, consider a simple territory hierarchy for a company that sells laptops and servers in the US. The company divides its US sales into east and west geographical regions. In each region, one territory sells laptops and the other sells servers. The company requires only two territory dimensions to define territories: geography and product.

The following table lists the territories and the values entered in the geography and product dimensions. A value of Any means that all values, even a missing value, match. The top territory in this hierarchy has a value of Any across all the dimensions making it a master catchall territory, a territory that is assigned to any record not matching any of the coverage values of other territories. The West and East territories have a value of Any for the Product dimension, making them catchall for any opportunities in those regions for products other than laptops and servers.

<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Geography</th>
<th>Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Product Sales</td>
<td>Any</td>
<td>Any</td>
</tr>
<tr>
<td>West</td>
<td>States in the western US</td>
<td>Any</td>
</tr>
<tr>
<td>East</td>
<td>States in the eastern US</td>
<td>Any</td>
</tr>
<tr>
<td>West Laptops</td>
<td>States in the western US</td>
<td>Laptops</td>
</tr>
</tbody>
</table>
### Territory Setup

<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Geography</th>
<th>Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>West Servers</td>
<td>States in the western US</td>
<td>Servers</td>
</tr>
<tr>
<td>East Laptops</td>
<td>States in the eastern US</td>
<td>Laptops</td>
</tr>
<tr>
<td>East Servers</td>
<td>States in the eastern US</td>
<td>Servers</td>
</tr>
</tbody>
</table>

The following figure shows a graphic representation of the territory hierarchy.

![Territory Hierarchy Diagram]

To assign accounts, assignment uses the address of the account only (there is no product information available in accounts). For example, to assign an account with an address in New York, the application:

1. Finds the following matching territories: East Laptops, East Servers, East, US Product Sales
   - East Laptops, East Servers, and East territories include New York explicitly in the list of states. US Product Sales has the value of Any in the geography dimension.
2. Discards East and US Product Sales because these are parents and grandparents of the East Laptops and East Servers

The account is assigned to the East Laptops and East Servers territories.

For assigning opportunities, the application assigns each opportunity line separately. The assignment process uses the address of the account for the geography dimension (each opportunity must be associated with an account). For example, here’s how the application assigns an opportunity for servers and laptops in a New York account.

The application assigns the servers opportunity line as follows:

1. Finds the following matching territories: East Servers, East, and US Product Sales
   - East Servers includes the correct product and state. East includes the state and Any as the value for the product. US Product Sales matches because it has Any for both dimensions.
2. Discards East and US Product Sales because these are parents and grandparents of East Servers

The application assigns the East Servers territory. The application uses the same process to assign the laptop opportunity line to the East Laptops territory.

For the matching territories, assignment gives each territory owner edit access to the opportunity as a whole and both territories are listed on the opportunity Sales team tab. Only the matching opportunity line is included in forecasts for that territory, however.

The following figure illustrates the different effects of territory assignment on opportunity access and forecasting. The diagram shows an opportunity for laptops and servers. If agent A owns the laptops territory and agent B owns the servers territory, then:

- Both agents gain edit access to the opportunity as a whole and are listed as members of the opportunity sales team.
- Agent A can only forecast laptops.
- Agent B can only forecast servers.
- Agent A’s and Agent B’s managers gain access to the opportunity as a whole but get to view and adjust only the forecasts submitted to them by their subordinates.
- The colleagues of agents A and B don’t have any visibility into the opportunity unless they have edit access to the account.
The Importance of Catchall Territories

Because some of the values required for assignment may be missing from the records you are assigning and because you may have gaps in your territory coverage, you must set up one or more catchall territories with any as the value for each of your territory dimensions. The value of any means that any value, even a missing value, is a match. The owner of the catchall territory, or another user you assign as a territory member, must monitor the catchall territory for records that did not get assigned properly. You can adjust your territory structure over time to minimize the number of records assigned to the catchall territories.

Using the sample territory setup, an opportunity for service (a product not specified in any territory) in a Japanese account (a geography not specified in any territory geography) is assigned to the overall catchall territory. An opportunity for service in California, gets assigned to the West territory.

How Sales Territories Work for Forecasting

You can enable two types of forecasts: Prime and Overlay. Forecasts designated as Prime forecast sales revenue. Overlay forecasts are designed to permit any overlay organization, such as sales support, to create a separate forecast, which is not included as part of the sales revenue forecast. How forecasting works depends on the hierarchy of the sales territories you
set up and the value you enter in the Enable Forecasting field for each territory. The Enable Forecasting field can have the following values:

- Prime only: the territory owner can forecast and adjust the sales revenue forecasts.
- Overlay only: the territory owner can forecast and adjust forecasts that are not counted in the sales revenue forecast.
- Prime and Overlay: the territory owner can adjust both types of forecasts.
- Disabled: the owner of the territory is excluded from creating or reviewing forecasts.

The sales territory hierarchy you set up determines how forecasts are passed up for adjustment and approval. In the example, the East Laptops and East Servers forecasts are automatically submitted to the owner of the East territory for adjustment and then passed on to the US Product Sales territory owner. The western forecasts mirror that process.

Two Sales Territory UIs for Different Users

There are two user interfaces for setting up sales territories: a full-featured UI used by implementors and sales administrators to set up the territory hierarchy, and a UI showing fewer features, which can be used by sales managers for ongoing minor adjustments to territories after they are set up. Users can toggle between the two UIs by clicking an icon with two arrows pointing to opposite sides. When you are in the UI with fewer details, the icon is named More Details; in the full-featured UI, it’s called Fewer Details.

Fewer Details for Sales Managers Making Minor Changes

By default, the application displays the Territories page in the Fewer Details UI when you open the Territories work area. The Territories page displays a list of territories and search fields similar to what you find in other work areas. The Fewer Details UI is optimized for sales managers who want to make simple changes to individual territories, such as changing territory owners or minor tweaks in coverage.
The following figure shows a screen capture of the Territories landing page in the Fewer Details UI. Clicking the **More Details** button, highlighted by callout 1, opens the More Details UI.

![Territories landing page](image)

### More Details for Implementors and Sales Administrators

The More Details UI is designed for implementors and sales administrators to set up or revise the entire territory hierarchy. The territory setup is done not on live territories but in a proposal which you must activate after your setup is complete. Proposals make it possible to make territory revisions without affecting live territories and to create different versions to be used at different times.

The following figure shows a partial screen capture of the Active Territories landing page in the More Details UI. The callouts listed in the following table highlight and describe different features on the page.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Feature Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>The Active Territories page displays the active territories as a collapsible hierarchy.</td>
</tr>
<tr>
<td>2</td>
<td>Selecting a territory, displays territory details at the bottom of the page</td>
</tr>
<tr>
<td>3</td>
<td>Using the <strong>Manage Proposals</strong> button you can create territory proposals with your territory changes.</td>
</tr>
<tr>
<td>4</td>
<td>The <strong>Show Dimensions</strong> button displays dimension details in the list of active territories.</td>
</tr>
<tr>
<td>5</td>
<td>The <strong>Show Metrics</strong> button displays metrics details in the list of active territories.</td>
</tr>
<tr>
<td>6</td>
<td>The <strong>Fewer Details</strong> button (two arrows) returns you to the less-detailed UI.</td>
</tr>
</tbody>
</table>
Differences Between the Two UIs

The following table outlines the major differences between what you can do in the More Details and Fewer Details UIs. Whichever UI you are using to make your territory changes, your records are not reassigned until the appropriate assignment process runs.

<table>
<thead>
<tr>
<th>Feature</th>
<th>More Details UI</th>
<th>Fewer Details UI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Changing a territory owner or member</td>
<td>Your changes are not effective until you activate the proposal.</td>
<td>Your changes take effect immediately.</td>
</tr>
<tr>
<td>Making changes without immediately affecting live territories</td>
<td>You create territories in a territory proposal that isolates your changes from existing active territories until you activate. You can even decide to create different proposals to.</td>
<td>Territory proposals are not available. Changes you make to territories are immediate.</td>
</tr>
</tbody>
</table>
Feature | More Details UI | Fewer Details UI  
--- | --- | ---  
Inheriting the properties of parent territories | When you create child territories in both UIs, the child territories automatically inherit the properties and coverage of the parent territories. In the More Details UI, you can also link territories so that any subsequent change in coverage for the parent territory is automatically reflected in the linked territory. | At creation, the child territories automatically inherit the properties and coverage of the parent territories. However, in the Fewer Details UI, you cannot link the territories to make subsequent coverage changes reflected automatically.  
Importing territories | Territories you import appear in a territory proposal, which you must activate. | Import is not supported.  

Making the More Details UI the Default and Only UI

By default, when they open the Territories work area, users see the Fewer Details UI and must click the More Details button to open the More Details UI. Also by default, users can use both UIs and toggle between them using the More Details and Fewer Details buttons. You can make the More Details UI the default UI and remove the buttons to prevent access to the Fewer Details UI, by changing the value of the system profile option Default to Territory Classic Interface (MOT_DEFAULT_CLASSIC_INTERFACE) to Yes. The setting, which is made at the site level, affects all users. You can edit the system profile value option by navigating to the Setup and Maintenance work area and using the following:

- Offering: Sales
- Functional Area: Sales Foundation
- Task: Manage Administrator Profile Values

Sales Territory Use Cases

Overview

This section uses very simple examples to illustrate principles of territory setup for assigning access to accounts and opportunities and enabling forecasting. The examples use the two most frequently used dimensions: geography and product. The use cases cover:

- Automatically assigning access to individual salespeople by product or geography.
- Automatically assigning access only to managers when salespeople manage and sell to their own accounts.
- Handling territories that don't roll up neatly by geography or by product and to separate assignment and forecasting.
- Automatically assigning product specialists and others to help with a particular opportunity line using special territories, called overlay territories.
- Setting up territories when you don’t need territory assignment but want to use quotas and forecasting.
- How to set up catchall territories so executives don’t have to troubleshoot territories.
- Ignoring or hiding the owner fields in the account and opportunity UIs and relying exclusively on sales territories and assignment rules to determine access.
As a rule, if you can draw the boundaries of sales territories along some dimension, then you should use sales territories to automatically assign access to accounts and opportunities to individual salespeople. Assigning salespeople using territories makes it easy for you to change the assignment when salespeople leave or are hired and to perform sales territory realignment. When you are realigning territories to balance the workload and to reward your top performers, you can experiment with different what-if sales territory scenarios in territory proposals. If you are dividing your territories by geographical region and by product, then you can draw the territory boundaries for individual salespeople by either dimension.

**Territory Boundaries by Product: Salespeople in a Region Sell Different Products to the Same Customers**

Suppose, for example, that all of the salespeople in a particular region sell different types of products to the same customers. You want salespeople in the region to coordinate their engagement with each customer and to be always included on those opportunities that involve their products.

You know which salespeople work in each region, so you can use territories to provide them with edit access to all accounts in their region using the geography dimension. You can then assign salespeople to opportunities when their products are involved using the product dimension.

**Territory Setup**

The US product sales organization is divided into two regions: West and East. Each regional office includes a manager and two salespeople who sell different products: one sells laptops and the other servers.

The following figure shows the sales territory hierarchy. You must always create at least one catchall territory with the value of Any for each of your dimensions. The master catchall territory is the topmost territory identified by callout 1, but both the West and East territories serve as catchall territories for the product dimension.
The following table lists the key entries for each territory. Territory Type is always set to **Prime** because all territories are used for sales revenue forecasting. The Enable Forecasting field is always set to **Prime only**, enabling the territory owner to participate in sales revenue forecasting.

<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Territory Type</th>
<th>Geography</th>
<th>Product</th>
<th>Enable Forecasting</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Product Sales</td>
<td>Prime</td>
<td>Any</td>
<td>Any</td>
<td>Prime only</td>
</tr>
<tr>
<td>East</td>
<td>Prime</td>
<td>All states in the eastern half of the US</td>
<td>Any</td>
<td>Prime only</td>
</tr>
<tr>
<td>East Laptops</td>
<td>Prime</td>
<td>All states in the eastern half of the US</td>
<td>Laptops</td>
<td>Prime only</td>
</tr>
<tr>
<td>East Servers</td>
<td>Prime</td>
<td>All states in the eastern half of the US</td>
<td>Servers</td>
<td>Prime only</td>
</tr>
<tr>
<td>West</td>
<td>Prime</td>
<td>All states in the western half of the US</td>
<td>Any</td>
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</tr>
<tr>
<td>West Servers</td>
<td>Prime</td>
<td>All states in the western half of the US</td>
<td>Servers</td>
<td>Prime only</td>
</tr>
</tbody>
</table>

**How Assignment Works for This Scenario**

When a lead comes in for a potential customer with an address in California who is interested in purchasing laptops, the inside sales team converts the qualified lead into an account and opportunity. The application does the following:

- Assigns the West Laptops and West Server territories to the account because California matches the geography dimension. The owners of the territories gain full access to the account and can share information about their interactions with the customer. Full access means they can add other team members in addition to editing the account information itself.

- If the account is missing the address, then the account is assigned to the catchall territory, US Product Sales.

- Assigns the West Laptops territory to the opportunity line using the product dimension and the address of the account. The laptop revenue can now be forecast by the West Laptops territory owner.

- If the opportunity line for the California account is for products other than laptops and servers, then the opportunity line is assigned to the West territory.

** Territories by Geography: Salespeople Sell All Products to Customers in Their Region**

If you draw boundaries by geographical region, then each salesperson handles customers in their particular geographical region and sells all of the products into that region.
Territory Setup

The following figure shows a sample territory structure. The west and east regions split the states in the US. The west and east regions are themselves divided into territories that split the states in each region.

The following table lists the key entries for each territory. The Product dimension value is always Any because salespeople sell all products. You could choose not include the Product dimension at all if you are not going to be using products for assignment elsewhere in your territory hierarchy. Just as in the Territory Boundaries by Product example, the Territory Type is always set to **Prime** and the Enable Forecasting field to **Prime only**.

<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Territory Type</th>
<th>Geography</th>
<th>Product</th>
<th>Enable Forecasting</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Product Sales</td>
<td>Prime</td>
<td>Any</td>
<td>Any</td>
<td>Prime only</td>
</tr>
<tr>
<td>East</td>
<td>Prime</td>
<td>All states in the eastern half of the US</td>
<td>Any</td>
<td>Prime only</td>
</tr>
<tr>
<td>East 1</td>
<td>Prime</td>
<td>A subset of the states in the east: New York, New Jersey, Massachusetts, Rhode Island, and so on.</td>
<td>Any</td>
<td>Prime only</td>
</tr>
<tr>
<td>East 2</td>
<td>Prime</td>
<td>A subset of the states in the east: Virginia, North Carolina, South Carolina, Florida, and so on.</td>
<td>Any</td>
<td>Prime only</td>
</tr>
<tr>
<td>West</td>
<td>Prime</td>
<td>All states in the western half of the US</td>
<td>Any</td>
<td>Prime only</td>
</tr>
<tr>
<td>West 1</td>
<td>Prime</td>
<td>A subset of the states in the west: California,</td>
<td>Any</td>
<td>Prime only</td>
</tr>
</tbody>
</table>
How Assignment Works for This Scenario

When a lead comes in for a potential customer with an address in California who is interested in purchasing laptops, the inside sales team converts the qualified lead into an account and opportunity. The application does the following:

- Assigns the West 1 territory to the account because California is in the West 1 territory. The salesperson in the territory gains edit access as does her management chain.
- Assigns the West 1 territory to any opportunity line for the California account using the account address.
- If the account is missing the address or is located in another country, then the account is assigned to the catchall territory, US Product Sales.

Salespeople in Each Region Manage Their Own Accounts and Sell All Products to Those Accounts

If individual salespeople in each region manage their own customer relationships and sell all products to those customers, then there may be no way of drawing sales territories to assign new accounts to them directly. Instead, you can automatically assign access to the managers in each region and have the managers distribute the accounts to the salespeople working for them. Even though you are not assigning records to individual salespeople, you must still set up territories for them so they can forecast.

Territory Setup

Because everyone sells all products, you can set up sales territories by geography only for the managers. For salespeople, you create territories with no coverage for the geography dimension so the territories get skipped over by assignment but can be used for forecasting. A territory with no coverage is blank, has no entry, for any dimension.
The following figure shows the territory hierarchy using only the geography dimension. Because all salespeople sell all products, the product dimension is not required unless you are using products in overlay territories or other portions of your territory setup. An entry of Blank means the territory has no coverage.

```
US Product Sales
  Geography: Any

  West
    Geography: West
      West 1
        Geography: Blank

  East
    Geography: East
      East 1
        Geography: Blank
      East 2
        Geography: Blank
```

The following table lists the key entries for each territory. Territory Type is always set to **Prime** because all territories are used for sales revenue forecasting. The Enable Forecasting field is always set to **Prime only**, enabling the territory owner to participate in sales revenue forecasting.

<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Territory Type</th>
<th>Geography</th>
<th>Enable Forecasting</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Product Sales</td>
<td>Prime</td>
<td>Any</td>
<td>Prime only</td>
</tr>
<tr>
<td>East</td>
<td>Prime</td>
<td>All states in the eastern half of the US</td>
<td>Prime only</td>
</tr>
<tr>
<td>East 1</td>
<td>Prime</td>
<td>Blank</td>
<td>Prime only</td>
</tr>
<tr>
<td>East 2</td>
<td>Prime</td>
<td>Blank</td>
<td>Prime only</td>
</tr>
<tr>
<td>West</td>
<td>Prime</td>
<td>All states in the western half of the US</td>
<td>Prime only</td>
</tr>
<tr>
<td>West 1</td>
<td>Prime</td>
<td>Blank</td>
<td>Prime only</td>
</tr>
<tr>
<td>West 2</td>
<td>Prime</td>
<td>Blank</td>
<td>Prime only</td>
</tr>
</tbody>
</table>

Child territories automatically inherit the coverage of their parent when you create them, so you must delete the inherited coverage to make them blank. For details on how to delete the coverage for a territory, see the Creating a Territory with No Coverage topic.
How Assignment Works for This Scenario

When a lead comes in for a potential customer with an address in California who is interested in purchasing laptops, the inside sales team converts the qualified lead into an account and opportunity. The application does the following:

1. Automatically assigns the new account to the West territory using the geography dimension.
2. The manager who is the owner for the West territory (or a sales administrator working on the manager’s behalf), edits the salesperson's territory and includes the account by name.
3. Running territory assignment automatically assigns the opportunity lines for that account to the same salesperson as well.

If an account is missing address information or the account is in a country other than the US, then the account is assigned to the catchall territory, US Product Sales.

Note: Because the accounts are assigned by name to the territories, administrators must manually move the accounts during territory realignment.

Handling Territory Hierarchies with Coverage That Doesn't Roll Up Properly

This topic explains how to set up territories to ensure proper assignment and forecasting for an irregular hierarchy. In a regular hierarchy, the coverage values in the child territories roll up to the parent. For example, the territory selling laptops in Hawaii and the territory selling servers in Hawaii both roll up to the territory selling products in the western US. In an irregular hierarchy, the two Hawaii territories have different parents which can result in wrong assignments and possible duplicate forecasts. You can use territories with no coverage for the parent territories in irregular hierarchies to ensure proper assignment and forecasting. A parent territory with no coverage still gets the forecasts from the children territories, but it's skipped over for assignment. Creating sales territories with no coverage, effectively separates assignment and forecasting.

The following two scenarios explain the difference between a regular hierarchy, where the dimension values of the parent include all of the relevant values underneath, and an irregular hierarchy where you can use territories with no coverage to correct for possible assignment and forecasting issues. You can create a territory with no coverage by deleting the coverage while working in a territory proposal following the steps outlined in the Creating a Territory with No Coverage topic.
Regular Geography Hierarchy

The following figure shows the structure of a simple regular geography hierarchy. The Western US territory includes territories for the western states and the Eastern US territory includes all the territories for the eastern states. Not all the territories are shown for simplicity. The West US territory is the parent of both Hawaii Servers and Hawaii Laptops.

```
US Sales

Western US

Hawaii Servers

Eastern US

Hawaii Laptops
```

The following table lists the settings for the territories in the diagram.

<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Territory Type</th>
<th>Geography</th>
<th>Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Sales</td>
<td>Prime</td>
<td>Any</td>
<td>Any</td>
</tr>
<tr>
<td>Eastern US</td>
<td>Prime</td>
<td>States in the eastern US.</td>
<td>Any</td>
</tr>
<tr>
<td>Western US</td>
<td>Prime</td>
<td>States in the western US.</td>
<td>Any</td>
</tr>
<tr>
<td>Hawaii Servers</td>
<td>Prime</td>
<td>Hawaii</td>
<td>Servers</td>
</tr>
<tr>
<td>Hawaii Laptops</td>
<td>Prime</td>
<td>Hawaii</td>
<td>Laptops</td>
</tr>
</tbody>
</table>

Here’s how the application assigns different objects using this territory setup:

- An account in Hawaii is automatically assigned to both the Hawaii Servers and Hawaii Laptops territories.
- An opportunity for a server in a Hawaiian account is assigned to the Hawaii Servers territory. An opportunity for a laptop goes to the Hawaii Servers territory.
- An opportunity for a service product in Hawaii is assigned to the Western US.

Irregular Geography Hierarchy

Now imagine a company where the Vice President for US Sales likes to play golf in Hawaii, so she decides to handle one of the Hawaii territories herself. The resulting territory structure splits Hawaii across two different hierarchy levels. The Hawaii
Servers territory is now a child of US Sales, while the Hawaii Laptops territory remains under Western US. The following figure reflects the change.

![Territory Diagram]

If you keep the territory settings the same and the same opportunity comes in for servers in the Hawaii account, the application assigns both the Western US and Hawaii Servers territories.

Here’s how the application arrived at the assignment:

1. The application first checks for all possible matching territories. These are Western US, Hawaii Servers, and US Sales.
2. The application discards all the ancestors of the matching territories: US Sales is a parent of Western US so gets discarded.

Because the opportunity is assigned to two territories in the hierarchy, it could end up in both territory forecasts and being counted twice in revenue projections.

You can fix the assignment issues in this example by creating the Western US territory with blank coverage. Having blank coverage (no coverage in all the territory dimensions) means the territory gets skipped for assignment, but still allows for forecasting to roll up as before. The following table lists the revised entries:

<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Territory Type</th>
<th>Geography</th>
<th>Product</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Sales</td>
<td>Prime</td>
<td>Any</td>
<td>Any</td>
</tr>
<tr>
<td>Eastern US</td>
<td>Prime</td>
<td>States in the eastern US.</td>
<td>Any</td>
</tr>
<tr>
<td>Hawaii Servers</td>
<td>Prime</td>
<td>Hawaii</td>
<td>Servers</td>
</tr>
<tr>
<td>Western US</td>
<td>Prime</td>
<td>Blank</td>
<td>Blank</td>
</tr>
<tr>
<td>Hawaii Laptops</td>
<td>Prime</td>
<td>Hawaii</td>
<td>Laptops</td>
</tr>
</tbody>
</table>
The application now assigns only the Hawaii Servers territory. Here's how the application arrived at the assignment:

1. The application first checks for all possible matching territories. These are Hawaii Servers, and US Sales.
2. The application discards all the ancestors of the matching territories: US Sales is a parent of Hawaii Servers and so gets discarded.

Assigning Others to Help with Individual Sales: Explained

Sometimes you want to assign others in your organization to assist with a sale. For example, if an opportunity line includes complex equipment, product specialists may be required to help with the technical details. You can make such assignments using overlay territories.

Sales Territory Setup

The following figure shows a simple overlay organization in a sales territory structure. The overlay organization consists of a manager and two product specialists. Each specialist is automatically assigned to help with the sale of a specific server model. The overlay organization territories are the children of the US Product Sales catchall territory for convenience.

The following table lists the key entries for each overlay territory. Note the following:

- The Territory Type is always set to Overlay.
- For the Sales Support Overlay territory, the values of both dimensions are blank. This ensures the territory is not assigned to any account or opportunity.
- The Enable Forecasting column for the overlay territories can be set to Disabled or Overlay Only.
  - Use Disabled if you are not forecasting overlay territories.
Use **Overlay Only** if your overlay organization creates its own forecasts for the sales where they are involved. Such overlay forecasts are not counted as part of the sales organization forecasts to prevent double counting. If you do enable overlay forecasting, then you must set the value for manager territories that approve or adjust forecasts for both prime and overlay territories, such as US Product Sales, to **Prime and Overlay**. Enabling forecasts by overlay territories also requires additional setup so salespeople can specify overlay credit on the opportunity UI itself. See the Implementing Sales guide for details.

<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Territory Type</th>
<th>Geography</th>
<th>Product</th>
<th>Enable Forecasting</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Product Sales</td>
<td>Prime</td>
<td>Any</td>
<td>Any</td>
<td>Prime or Prime and Overlay</td>
</tr>
<tr>
<td>Sales Support Overlay</td>
<td>Overlay</td>
<td>Blank</td>
<td>Blank</td>
<td>Disabled or Overlay Only</td>
</tr>
<tr>
<td>Sentinel Server Overlay</td>
<td>Overlay</td>
<td>Any</td>
<td>Sentinel Servers</td>
<td>Disabled or Overlay Only</td>
</tr>
<tr>
<td>Green Server Overlay</td>
<td>Overlay</td>
<td>Any</td>
<td>Green Servers</td>
<td>Disabled or Overlay Only</td>
</tr>
</tbody>
</table>

Child territories automatically inherit the coverage of their parent when you create them, so, for the Sales Support Overlay territory, you must delete the inherited coverage as described in Creating a Territory with No Coverage topic.

**How Assignment Works for This Scenario**

The application assigns both the prime and overlay territories at the same time. Here is the detail for the assignment of overlay territories:

- The application assigns both the Sentinel Server Overlay and Green Server Overlay territories to all accounts because the Geography dimension is set to Any. This provides the overlay team access to account notes, activities, and other details they need if they engage with the account.
- The application assigns the Sentinel Server Overlay and Green Server Overlay territories only to opportunities with server products in those two product groups.

**Setting Up Sales Territories When You Only Use Forecasting and Quota Management**

If you want to use forecasting and quota management but don’t need to use sales territories for assignment, then you can set up a hierarchy of sales territories that mirrors the resource hierarchy and automatically makes the record owner the territory owner as well. Whoever creates an opportunity becomes its owner and the application assigns the opportunity to that person’s territory. The owner of the opportunity always has the opportunity in his or her territory.

To set up territories where the record owner is also the territory owner, follow the instructions in the white paper you can download from the Setting Up Resource-Based Territories to Enable Forecasting and Quotas document (2446788.1) available on support.oracle.com.

**Note:** You cannot mix assignment using the record owner with assignment using dimension values for records for the same object. For example, you cannot assign some accounts using dimension values and other accounts directly to the record owners. If you are using assignment by record owner for accounts, then you can assign opportunities using dimension values, however.
The following figure shows a sample territory hierarchy. No dimensions are shown because they are not used for assignment.

The following table lists the key entries in sales territory setup. Even though you are not using any dimensions or coverage for assignment, sales territory setup requires you to enable a dimension. Which dimension you enable doesn’t matter.

<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Territory Type</th>
<th>Any Dimension</th>
<th>Enable Forecasting</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Product Sales</td>
<td>Prime</td>
<td>Blank</td>
<td>Prime</td>
</tr>
<tr>
<td>West</td>
<td>Prime</td>
<td>Blank</td>
<td>Prime</td>
</tr>
<tr>
<td>West 1</td>
<td>Prime</td>
<td>Blank</td>
<td>Prime</td>
</tr>
<tr>
<td>West 2</td>
<td>Prime</td>
<td>Blank</td>
<td>Prime</td>
</tr>
<tr>
<td>East</td>
<td>Prime</td>
<td>Blank</td>
<td>Prime</td>
</tr>
<tr>
<td>East 1</td>
<td>Prime</td>
<td>Blank</td>
<td>Prime</td>
</tr>
<tr>
<td>East 2</td>
<td>Prime</td>
<td>Blank</td>
<td>Prime</td>
</tr>
</tbody>
</table>
What to Do When You Don't Want Executives Handling Catchall Territories

Catchall territories are territories high up in the territory hierarchy that have a value of Any for some or all of the territory dimensions. Your organization must monitor the catchall territories to identify and reassign records with incomplete data and to adjust for any gaps in your territory structure. The territories at the top of your hierarchy are usually owned by sales executives who are not involved in territory troubleshooting. You can make it possible for others to manage the catchall territories in either one of two ways:

- You can add the sales administrator as a member of the catchall territory. Territory members you add can participate in all tasks including forecast reviews.
- You can create the executive's territory as a territory blank with no coverage and create a separate catchall territory with Any as the value for the appropriate dimensions.

When you create separate territories, the executive can review and adjust all the forecasts from the sales team, but owner of the catchall territory can troubleshoot any accounts or opportunities that are not properly assigned. You can turn off forecasting for the catchall so that the catchall territory owner doesn’t see the forecast the executive is approving. The following figure shows a sample territory hierarchy with a separate master catchall territory. The separate master catchall territory US Product Sales is a child of US Product Sales and the parent of the next level of territories: West US and East US. A catchall must be a parent node. It cannot be a leaf node in the hierarchy.

The following table details the setup for the territories. Entering the value Disabled in the Enable Forecasting field for the catchall territory, disables access to forecasting for the territory owner.
<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Territory Type</th>
<th>Geography</th>
<th>Product</th>
<th>Enable Forecasting</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Product Sales</td>
<td>Prime</td>
<td>Blank</td>
<td>Blank</td>
<td>Prime</td>
</tr>
<tr>
<td>US Product Sales</td>
<td>Prime</td>
<td>Any</td>
<td>Any</td>
<td>Disabled</td>
</tr>
<tr>
<td>Catchall</td>
<td></td>
<td>States in the western US</td>
<td></td>
<td></td>
</tr>
<tr>
<td>West US</td>
<td>Prime</td>
<td>States in the western US</td>
<td>Any</td>
<td>Prime</td>
</tr>
<tr>
<td>West Laptops</td>
<td>Prime</td>
<td>States in the western US</td>
<td>Laptops</td>
<td>Prime</td>
</tr>
<tr>
<td>West Servers</td>
<td>Prime</td>
<td>States in the western US</td>
<td>Servers</td>
<td>Prime</td>
</tr>
<tr>
<td>East US</td>
<td>Prime</td>
<td>States in the eastern US</td>
<td>Any</td>
<td>Prime</td>
</tr>
<tr>
<td>East Laptops</td>
<td>Prime</td>
<td>States in the eastern US</td>
<td>Laptops</td>
<td>Prime</td>
</tr>
<tr>
<td>East Servers</td>
<td>Prime</td>
<td>States in the eastern US</td>
<td>Servers</td>
<td>Prime</td>
</tr>
</tbody>
</table>

**Ignoring the Owner Field and Relying on Territory Assignment Exclusively**

Sales territory assignment and rule assignment do not assign the owner of account, opportunity, and lead records. Whoever creates any record becomes its owner and ownership is completely separate way of providing edit access to data. Ownership can be manually reassigned in one of three ways:

- An owner of a record can transfer ownership to another resource.
- A sales administrator can transfer ownership of multiple records using the Mass Transfer feature available in the Navigator.
- The resource converting a qualified lead into an account and opportunity can also assign the owner at the time of conversion.

If you want to rely exclusively on sales territory and rule assignment to provide access, then you can have your organization ignore the owner field and you can make minor modifications to the UI as described in the Extending Sales guide:

- By default each work area displays a list of records owned by the user, called My Opportunities, My Accounts and so on. You can replace these default lists with your own lists displaying records in user territories.
- You can also remove the infolets summarizing owned records and even hide the field itself in the UI using Application Composer.

Organizations concerned about unauthorized access by owners can create a dummy user and assign ownership of records to that dummy resource. Whatever solution you explore, you must keep in mind that the owner field assures that the creator of an object retains access to that object.
Providing Managers with Access to All the Accounts and Opportunities in a Multilayered Organization

If your customers include large multilayered organizations, then you can use a combination of account hierarchies and sales territory setup to ensure that key account directors can access the account and opportunities for the whole organization. Accounts for a large multinational corporation, for example, are typically assigned to sales teams in different countries or regions. Because managers in each region can only access information in their own region, no single manager can access all of the accounts and opportunities for the entire multinational. By including the account at the top of the multinational hierarchy in the territory of a manager, you can provide that manager with edit access to all accounts and opportunities in the hierarchy, regardless of where they are located. Managers get access to the account you include in the territory, and to all the accounts below it in the hierarchy, so you can also provide access to a subset of the hierarchy.

Setup Summary

1. Create the account hierarchy either directly in the Edit Account UI or by importing the hierarchy as described in this guide.
2. Include the top account or another account in the hierarchy as follows:
   a. Create the territory in a territory proposal.
   b. On the Coverages tab in the Included Customers, Selected Customers region, click **Select and Add**.

      The Select and Add window appears.
   c. Search for the account by name or other criteria.
   d. Click **Save and Close** to include the account and return to the Coverages tab.
   e. Select the account and click **Include Hierarchy**.

      The Include Hierarchy indicator appears in the Include Hierarchy column.

The following figure shows a screen capture of a sample territory in the Territory Proposal page with the Pinnacle Technologies account included on the Coverages tab. The presence of the Include Hierarchy
Sales Territory and Assignment Setup for the Vision Corp. Use Case

This topic explains the use case for the sales territory setup detailed in this chapter. The fictitious Vision Corp. divides its field sales organization for the US into two regions, East and West. Each regional sales organization includes two salespeople, one sells laptops and the other servers. A sales support organization helps out with sales of technically complex server products. The organization includes a sales administrator who monitors and refines the territory assignment and two inside sales representatives who qualify leads.
The Organization and Use Case

The following figure shows the Vision Corp. sales resource hierarchy you set up earlier.
Sales Territory Setup

Vision Corp. creates territories using the geography and product dimensions. The following figure shows the corresponding sales territory structure with the territory names, owners, and the entries for the geography and product dimensions. Notice that:

- The top territory, US Product Sales, is the master catchall territory. The territory is owned by Martin Conway and includes the sales administrator John Dunbar. By being assigned to the catchall, John Dunbar can monitor any accounts and opportunities that are assigned to the master catchall territory and to the West and East catchall territories as well. By monitoring the catchall territories, John can refine the territory structure over time and fill in any gaps.
- The Sales Support territory owned by Alex Smith has blank (no value) entries for Geography and Products coverage. No accounts and opportunities are assigned to him because he only manages the product specialists working for him.
- Peter Branch and Marilyn Richie are assigned to help with opportunities that involve their products, Sentinel Servers or Green Servers.
- The inside sales representatives do not have any territories because they qualify leads assigned to them using rules you set up as part of the Setting Up Leads chapter.

The following table lists the key entries in the setup for the territories. Note the following:

- The entries in the Product dimension column are the product groups in the sales catalog. Selecting a product group includes all the product groups and products nested within the product group.
Because Vision Corp. is forecasting sales only (there is no forecast for the sales support organization), the Enable Forecasting column value for the overlay territories is set to Disabled. For the prime territories the value is Prime Only.

The Sales Support territory has no coverage values so it does not get assigned to any accounts and opportunities. Because each child territory automatically inherits the coverage of its parent, you must delete the coverage to make it blank. For details, see the Creating a Territory with No Coverage topic.

<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Territory Owner</th>
<th>Territory Type</th>
<th>Geography</th>
<th>Products</th>
<th>Enable Forecasting</th>
</tr>
</thead>
<tbody>
<tr>
<td>US Product Sales</td>
<td>Martin Conway</td>
<td>Prime</td>
<td>Any</td>
<td>Any</td>
<td>Prime only</td>
</tr>
<tr>
<td></td>
<td>John Dunbar</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>East</td>
<td>Michael Rhodes</td>
<td>Prime</td>
<td>Arkansas and all the other states in the eastern US</td>
<td>Any</td>
<td>Prime only</td>
</tr>
<tr>
<td>East Laptops</td>
<td>Kristen Garrity</td>
<td>Prime</td>
<td>Arkansas and all the other states in the eastern US</td>
<td>Laptops</td>
<td>Prime only</td>
</tr>
<tr>
<td>East Servers</td>
<td>Sean Goodkin</td>
<td>Prime</td>
<td>Arkansas and all the other states in the eastern US</td>
<td>Servers</td>
<td>Prime only</td>
</tr>
<tr>
<td>Sales Support</td>
<td>Alex Smith</td>
<td>Overlay</td>
<td>Blank (no value)</td>
<td>Blank (no value)</td>
<td>Disabled</td>
</tr>
<tr>
<td>Sentinel Servers</td>
<td>Peter Branch</td>
<td>Overlay</td>
<td>Any</td>
<td>Sentinel Servers</td>
<td>Disabled</td>
</tr>
<tr>
<td>Green Servers</td>
<td>Marilyn Richie</td>
<td>Overlay</td>
<td>Any</td>
<td>Green Servers</td>
<td>Disabled</td>
</tr>
<tr>
<td>West</td>
<td>Mateo Lopez</td>
<td>Prime</td>
<td>Alaska and all the other states in the western US</td>
<td>Any</td>
<td>Prime only</td>
</tr>
<tr>
<td>West Laptops</td>
<td>Lisa Jones</td>
<td>Prime</td>
<td>Alaska and all the other states in the western US</td>
<td>Laptops</td>
<td>Prime only</td>
</tr>
<tr>
<td>West Servers</td>
<td>Julian Henderson</td>
<td>Prime</td>
<td>Alaska and all the other states in the western US</td>
<td>Servers</td>
<td>Prime only</td>
</tr>
</tbody>
</table>

How It Works

Vision Corp. runs the assignment process once a day in off-peak periods to assign new account or opportunities and qualified leads. Here’s an outline of how assignment works for accounts:

- The application assigns an account to both the prime and overlay territories using the state the account is located in. A new account in Alaska gets assigned to West Laptops, West Servers, Sentinel Servers, and Green Servers territories. The owners and members of these territories gain access.
• If the account information is missing a state for some reason or is in a country other than the US, then the application assigns the account to the US Product Sales. Sales administrator John Dunbar reviews and troubleshoots the accounts assigned to this catchall territory.

The application assigns opportunities and qualified leads using the geography information from the account and the product in each opportunity. For forecasting purposes, each opportunity line is assigned individually to territories and the territory owner gets to forecast only that line, but the territory owner gains edit access to the whole opportunity and the territory is listed on the opportunity Sales Team tab:

• An opportunity for green servers in an Alaska account, gets assigned to the West Servers prime territory and to the Green Servers overlay territory.
• An opportunity for laptops in the same Alaska account, gets assigned to the West Laptops prime territory only.
• An opportunity for both green servers and laptops in the same Alaska account, gets assigned the West Laptops, West Servers prime territories and the Green Servers overlay territory. All three territory owners gain edit access to the opportunity and the territories show up in the opportunity Sales Team tab. Although each territory member gains access to the opportunity as a whole, the forecasts for each of the prime territories include only their specific products.
• If an opportunity for the Alaska account includes a product not included in any of the territory coverages, then the application assigns the West territory.

Preparing to Create Territories

Specifying Geography Elements for Territory Setup

This task is required only if you are creating territories with geography as one of the dimensions. For example, if you are creating territories based on states, you must enable the states for selection during territory creation.

In an earlier step, you imported the reference geography for the countries where you do business. Now you must specify which of those geography elements you want to use in your sales territories. Vision Corp. is creating territories by states, so it enables states.

Optionally, you can organize the geographies into zones to simplify territory creation. Vision Corp. imported just one country, the US, and divides the country into two geographical regions: West and East.

Vision has two options:

• To enable states only
  Individual territories require the entry of the states they cover. For example, you must enter all the western states in the West territory and the eastern states in the East territory.

• To enable the states and create zones to organize them
  If you organize the states in zones, you can then select the zone in each territory rather than entering the individual states. For example, if you create a West zone and add all the western states, then you can select the West zone for the West territory instead of the individual states.

Vision Corp. foregoes zones and enables states only. When building the territory hierarchy, creating child territories automatically copies the existing coverage from the parents. The individual states you entered are copied as well.
To specify which geography elements you want to use for sales territories:

1. While signed in as a setup user, open the Manage Territory Geographies task from the implementation project. Alternatively, you can open the task from the Setup: Sales page in the Setup and Maintenance work area.

   The Manage Territory Geographies page appears.

2. In the Zones Hierarchies region, select Add Geography from the Actions menu.

   The Add Geography page appears.

3. Open the Country list and click Search.

   The following figure shows a partial screen capture of the Add Geography page with the Country list open. The Search link appears in the list.

4. In the Search and Select Country window, search for the country, select it, and click OK.

5. Click Search. The geographies belonging to the country appear in the Add Geography page.
The following figure shows a screen capture of the Add Geography page listing the geography types for the US.

6. Select the country and click **Submit**.
7. In the Confirmation window, select the **Add geography and include selected children** option.
8. Select the geography elements you want to use in territories. For Vision Corp, this is **State**.
The following figure shows a screen capture of the Confirmation window with the Add Geography and Include Selected Children and the State options selected.

![Confirmation Window](image)

9. Click **OK**.
10. Click **OK** again in the batch process confirmation box.
11. Click **OK**.

### Enabling Sales Territory Dimensions

You must enable the territory dimensions that you will use to create your sales territories. Make sure you have all the source data available before you start. Vision Corp. plans to enable the Product and Geography dimensions, so it has completed the sales catalog and territory geography setup.

To enable the territory dimensions, do the following:

1. While signed in as a setup user, open the task **Enable Dimensions and Metrics** from the implementation project.

   The Enable Dimensions and Metrics page appears.

2. Click **Edit**.
The Edit: Enable Dimensions and Metrics page appears. The following figure shows a screen capture of a partial page highlighting the location of the Select and Add button.

3. In the Dimensions region, click **Select and Add**.

   The Select and Add: Dimensions window appears.

4. Select the dimensions that you want to use and click **OK**. Vision Corporation adds **Geography** and **Product**.

5. From the Actions menu at the page level, select **Load and Activate**.

   **Note:** If you are activating the Product dimension, then, before clicking Load and Activate, check to make sure you ran the Refresh Denormalized Product Catalog Table for BI process as described in the Setting Up Your Sales Catalog chapter.

You can select **Refresh Status** from the Actions menu at the page level to monitor the process progress. When the process completes successfully, you can start defining territories in the application.

For more information about enabling dimensions, see the Setting Up Sales Territories chapter in the Oracle Sales Cloud Implementing Sales guide.

**Creating the Sales Territory Hierarchy**
Creating a Territory Proposal

Use this procedure to create a territory proposal. A territory proposal is the sandbox where you create the sales territory hierarchy.

1. While signed in as a setup user, open the task Manage Territory Proposals from the implementation project or navigate to the Territories work area.
2. Click the Manage Proposals button on the Active Territories page. The Manage Territory Proposals page appears.
3. In the Current Territory Proposals region, click Create (the plus sign icon). The Create Territory Proposal window appears.
4. Enter a name for the proposal.
5. Leave the Activation Date field blank. This will cause the proposal to be activated immediately after you build your territories.
6. Click Save and View.

Your territory proposal opens and you can start building your territory hierarchy.

Creating the Sales Territory Hierarchy

With your territory proposal open, create the sales territory hierarchy starting with the top territory in the hierarchy. For each territory you create, you enter the name of the salesperson or manager who owns the territory and the values for the dimensions that form the territory boundaries. When you create child territories, the application automatically copies all the dimension values from the parent territories to speed up entry. The procedures in this topic provide instructions for setting up a hierarchy similar to the one in the Vision Corp. use case: with the master catchall territory at the top of the hierarchy as described in the topic Sales Territory and Assignment Setup for the Vision Corp. Use Case.

Creating the Master Catchall as the Top of the Hierarchy

Use this procedure to create the territory at the top of the sales territory hierarchy as the master catchall territory. Because the top territory is usually owned by a senior manager or executive and you don’t want executives troubleshooting territory assignment, you must add a sales administrator, or another resource who does the troubleshooting, as a territory team member.

To create the top sales territory as a master catchall:

1. In the Territories region of your territory proposal, click Create. The Create Territory page appears.
2. Enter the territory name, for example, US Product Sales.
3. Enter the resource who is the owner of the top territory, most likely the VP of Sales, as follows:
   a. From the Owner list, select Search
   b. Search for the resource name using any of the criteria.
   c. Select the name and click OK.
   The owner appears on the Territory Team tab. You can add additional members to the team, and the owner himself can add members later. If the top territory is a catchall territory, then
4. From the territory Type list, select Prime.
5. From the Enable Forecasting list, select Prime only unless you are creating forecasts for overlay territories. This setting enables the territory to be used for forecasting.
6. To add the sales administrator for troubleshooting sales territory setup, do the following:
   
   a. In the Territory Team tab in the Additional Information region, click **Select and Add**.
      
      The Select and Add: Territory Team Members page appears.
   
   b. Search for the resource using any of the fields.
   
   c. Select the resource from the search results and click **OK**.

7. Click **Save and Close**.

Your new territory appears in the Territories table of your proposal.

8. With the territory selected in the Territories table, click the Coverages tab in the Details region at the bottom of the page.

   Every enabled dimension is represented by a column, and each column displays the value of **Any**. For the Vision Corp. example, this entry means that sales accounts in any location and for any product are assigned to this territory. This is the setting you want for your master catchall territory.

   **Note**: If the Coverages tab is blank, then your territory configuration is incomplete. Navigate to Scheduled Processes and check to see whether the Synchronize Stage Environment process completed successfully. See Enabling Territory Dimensions topic for more information.
The following figure shows a screen capture of the Territory Proposal page with the top and only territory selected. Callout 1 highlights the location of the Coverages tab. Callout 2 highlights the coverage row, which automatically displays **Any** as the value for all the dimensions you enabled for the first territory in your hierarchy.

You are now ready to add the rest of the territory hierarchy.

**Adding the Rest of the Hierarchy**

With the territory proposal open, add the rest of the sales territory hierarchy from the top down. Add each territory as follows:

1. Select the parent territory in the Territories table.
2. Click **Create Child of Selected Territory** (the plus sign icon).
The Create Territory page appears.

3. Enter the territory name.
4. Enter the owner for the territory.
5. Select the territory type, either Prime or Overlay depending on the territory you are creating.
6. From the Enable Forecasting list, select Prime only for territories involved in forecasts, or Disabled for overlay territories, unless you are forecasting overlay territories. The setting of Disabled removes the territory from forecasting.
7. Click Save and Close.
   You are returned to the Territory Proposal page. You are now ready to enter the values for the different territory dimensions.
8. If you are creating a territory with no coverage, then:
   a. Select the row showing the coverage values in the Dimensional Coverage region on the Coverages tab.
   b. Click Delete (the x icon).
      The application warns you that your action will remove all data in the table.
   c. Click Yes in the warning.
      The entire row is deleted.
9. If you are creating a territory with coverage then enter the values for the dimensions as follows:
   a. With the territory selected in the Territories table, click Edit Coverage.
      The Edit Coverage window appears.
b. For each dimension you want to change:
   
i. Select the dimension from the Dimensions list.
   
   ii. Add or remove dimension members from the Selected Dimension Members box.

   For example, to specify the states in Vision Corp.’s West territory, you would move all of the states in the western half of the US to the Selected Dimension Members box.

   Tip: If the Product dimension does not show the correct list of products from the sales catalog, then navigate to the Scheduled Processes work area and run the Refresh Denormalized Product Catalog Table for BI process. The wrong products can show up in rare cases where you have changed the root of your sales catalog.

   iii. Click Save and Close.

   You are returned to the Territory Proposal page. The Coverages tab in the Details region shows the coverages for the territory.

When you complete adding territories and specifying coverages, you are ready to activate your territory proposal.

Activating the Territory Proposal

When you have completed building your territory hierarchy, you can either click Activate while still editing the territory proposal, or use the following procedure to activate the territory proposal from the Manage Territory Proposals page.

To activate the territory proposal, do the following:

1. While signed in as a setup user, open the Manage Territory Proposals task from the implementation project or navigate to the Territories work area.

2. Click the Manage Territory Proposals link.

   The Manage Territory Proposals page appears.

3. If the proposal you want to activate doesn’t appear in the Current Territory Proposals table, select All Proposals from the Proposals list.

4. Select the proposal and click Activate.

   The application displays the proposal in the Completed Territory Proposals region. You can refresh the page to display the most recent status and navigate to the Territories page to view the territories after they are active.

Creating a Territory with No Coverage

You can create territories that are skipped by the assignment process by deleting the coverage across all territory dimensions. Territories with no coverage can be used for forecasting accounts included by name and to group other territories in a hierarchy. You can only delete coverage while you are in a territory proposal and you can only delete coverage across all the dimensions in a territory. You cannot delete coverage for individual dimensions.

To delete coverage in a territory, do the following:

1. Select the territory in the Territories region in the proposal and make sure it’s added to the proposal.
The following figure shows a screen capture of the Territories region of a sample territory proposal. The selected line shows a Yes in the Added to Proposal column indicating that the territory is in the proposal.

2. In the Details region, select the **Coverages** tab.
3. Select the row showing the coverage values in the Dimensional Coverage region on the tab.
The following figure shows a partial screen capture Territory Proposal window showing the Coverages tab. Callout 1 shows the location of the row of values you delete to create a territory with no coverage. Callout 2 indicates the location of the Delete icon.

4. Click **Delete** (the x icon).

The application warns you that your action will remove all data in the table.

5. Click **Yes** in the warning.

The entire row is deleted.

6. Save.

### Making Opportunity Assignment Automatic

By default, sales users must assign opportunities manually when they edit each opportunity. You can make the assignment of opportunities automatic by setting the system profile option Assignment Submission at Save Enabled.

To set the system profile option, do the following:

1. While signed in as a sales administrator or setup user, open the **Manage Opportunity Profile Options** task from the implementation project. You can also open the task from the Setup: Sales page, by clicking the **Opportunity** functional area and then clicking the **Manage Opportunity Profile Options** task name link.

2. In the Search region of the Manage Opportunity Profile Options page, enter **Assignment Submission at Save Enabled** in the **Profile Display Name** field.

3. In the MOO-OPTY_ENABLE_AUTO_ASSIGN: Profile Values region, select **Yes** from the **Profile Value** list.

4. Click **Save and Close**.
Note: It is recommended to schedule the assignment process to run daily to ensure that all opportunities are assigned properly.

Running Assignment Processes

Running the Account Assignment Process

You must run the Request Account Assignments process to assign territories to accounts after you activate a territory proposal. You must also schedule this process to run regularly to ensure that all territories are assigned properly.

To run the process, do the following:

1. While signed in as a setup user, open the **Request Account Assignments Process** task in the implementation project.
2. If you are not using the implementation project, then do the following:
   a. Navigate to the Scheduled Processes work area.
   b. On the Overview page, click **Schedule New Process**.
      The Schedule New Process window appears.
   c. Enter **Request Account** in the **Name** field and press **Return**.
   d. Click **OK**.

   The Process Details page appears.
3. Make the entries described in the following table to assign all of the accounts:

<table>
<thead>
<tr>
<th>Field</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Object</td>
<td>Enter SalesAccount.Work_Object.</td>
</tr>
<tr>
<td>Candidate Object</td>
<td>Enter SalesAccountTerritory.Candidate.Object.</td>
</tr>
<tr>
<td>Assignment Mode</td>
<td>Select <strong>Territory</strong> from the list.</td>
</tr>
<tr>
<td>View Criteria Name</td>
<td>Enter AllSalesAccountsVC.</td>
</tr>
</tbody>
</table>

Note: You can run the assignment process on a subset of records rather than on all records by entering different parameters in the **View Criteria Name** and **View Criteria Bind Values** fields. See the topic Scheduling Account Assignment: Explained in the Implementing Sales guide.

4. The first time you run the process click **Submit** to run it immediately.
5. You must also set up the process to run on a regular basis, perhaps once a day as follows:
   a. Click **Advanced**.
   b. Click the Schedule tab.
   c. Select the **Using a schedule** option.
The following figure shows a screen capture of the Process Details page with the Schedule tab and the Using a Schedule option selected. The frequency is set to Daily by default.

- **d.** Select the frequency and start date.
- **e.** Enter an end date far in the future.
- **f.** Click **Submit**.

6. Depending on your settings, your process runs immediately or at the intervals you specified. You can monitor its progress by searching for the process by name on the Overview page.

**Related Topics**
- [Scheduling Account Assignment: Explained](#)

**Running the Opportunity Assignment Process**

You must run the Revenue Territory Territory Based Assignment process to assign territories to opportunities after you activate a territory proposal. It is recommended to schedule this process to run daily to ensure that all territories are assigned properly.
To run the process, do the following:

1. While signed in as a setup user, open the Revenue Territory Territory Based Assignment task from the implementation project.

2. If you are not using the project, you can open the task as follows:
   a. While signed in as a setup user or sales administrator, select Scheduled Processes in the Tools group in the Navigator.
   c. In the Schedule New Process dialog, click Search: Name icon (down arrow) in the Name field and then select the Search link.
   d. In the Search and Select dialog, enter the process name Revenue Territory, and click Search. You can search by a partial name, but note that the search is case-sensitive.
   e. Select the process name in the results and click OK.
   f. Click OK again if required.

The Process Details window appears.

3. Enter the process parameters listed in the following table:
### Field Entry

**View Criteria Name**  
Enter OpenOpportunitiesByCreationDate.

**View Criteria Bind Values**  
You can have the option of assigning territories to those open opportunities created since a certain date or those created for a range of dates:

- For a specific date, enter `BindOptyCreationDateFrom=YYYY-MM-DD` where `YYYY-MM-DD` is the date you started implementing the application. For example, `BindOptyCreationDateFrom=2014-01-01` assigns all open opportunities created since January 1, 2014.
- To use a date range, enter `BindOptyCreationDateFrom=<date>, BindOptyCreationDateTo=<date>`. Note that the From and To values are separated by a comma.

---

**Note:** You can find more information about the process parameters in both the Oracle Sales Cloud Implementing Sales guide and application help, by searching for the Revenue Territory Territory Based Assignment Process.

### To run this process periodically:

4. Click **Advanced**.
   - **a.** Select the **Schedule** tab.
   - **b.** Select the **Using a schedule** option.
   - **c.** Select the frequency and start date.

5. Click **Submit**.

6. Unless you specified a schedule, your process runs immediately. You can monitor its progress by searching for the process by name on the Overview page.
15 Setting Up Leads

About Leads and Lead Types

You use leads to capture interest in your product or service shown by a prospect or customer. Your business may get potential interest from multiple sources such as web visits, trade shows, marketing or sales campaigns, predictive analysis, purchased lists and so on. You want your field sales teams to focus on high potential interests. Your business can leverage leads functionality to qualify initial lead interest and convert leads to opportunities. A team of inside sales representatives or marketing and sales representatives can review generated leads to qualify and convert to opportunities.

Lead Types

You can distinguish between net new leads, leads that require verification before creating new account and contact records in your application, from high-quality leads or leads for existing accounts and contacts. Net new leads keep the account and contact information in the lead as text until you are ready to convert them. Leads created for existing accounts and contacts, for example, by sales campaigns and product recommendations, are linked directly to those records.

The following table explains the key differences between the two types of leads.

<table>
<thead>
<tr>
<th>Lead Type</th>
<th>Display of Account and Contact Name</th>
<th>Account and Contact Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Net new leads</td>
<td>Account and contact names are displayed as text.</td>
<td>New account and contact records are created only when a salesperson converts the lead to an opportunity.</td>
</tr>
<tr>
<td>Leads for existing accounts</td>
<td>Account and contact names display as links.</td>
<td>Accounts and contacts already exist in the application.</td>
</tr>
</tbody>
</table>
The following figure shows a partial screen capture of the Edit Lead page for a net new lead. Both the **Primary Contact** field (callout 1) and the **Account** field (callout 2) display as text.

### Edit Lead: Kroger: Summary

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Primary Contact</td>
<td>Karan Gochal</td>
</tr>
<tr>
<td>Name</td>
<td>Kroger</td>
</tr>
<tr>
<td>Job Title</td>
<td>Vice President</td>
</tr>
<tr>
<td>Account</td>
<td>General Corp.</td>
</tr>
<tr>
<td>Primary Product</td>
<td></td>
</tr>
<tr>
<td>Contact Phone</td>
<td>1 222 6565</td>
</tr>
<tr>
<td>Contact E-Mail</td>
<td><a href="mailto:karan.gochal-demodata@oracle.com">karan.gochal-demodata@oracle.com</a></td>
</tr>
<tr>
<td>Attachments</td>
<td>None</td>
</tr>
<tr>
<td>Description</td>
<td></td>
</tr>
</tbody>
</table>

**Contact Address**

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Country</td>
<td>United States</td>
</tr>
<tr>
<td>Address Line 1</td>
<td>2 Manor St.</td>
</tr>
<tr>
<td>Address Line 2</td>
<td>Canal Ave.</td>
</tr>
</tbody>
</table>

The following figure shows a partial screen capture of a lead for an existing account and contact. The entries in the **Primary Contact** field (callout 3) and **Account** field (callout 4) appear as links.
Entering and Editing Leads in the UI

As you start typing the lead account name or the primary contact name in the Create Lead page, the application suggests any matching accounts and contacts already in your database. If there is a match, then you make a selection from the list to link to the existing account or contact. If there is no match, the account or contact name is saved as text in the lead. No account and contact is created until you convert the lead into an opportunity.

If you have licensed Oracle Enterprise Data Quality and the Oracle Social Data and Insight Cloud service, then the salesperson can also use these services to check for duplicates and to enrich the account and contact records with additional information. The salesperson initiates the duplicate check by selecting the **Check for Duplicates** action.
Leads Use Case Covered in This Chapter

This chapter covers the setup for a common use case for qualifying leads you gathered from multiple sources such as web visits, trade shows, marketing or sales campaigns, predictive analysis, purchased lists and so on. Because the majority of these leads are for prospects, you import them as net new leads so you can qualify and convert them to opportunities. This use case follows the common practice of using inside sales to do the initial lead qualification, but there is nothing stopping you from modifying the use case to suit your needs.

This topic provides a brief overview of the use case and then discusses some key details of how the organization processes leads.

Use Case Overview

Vision Corp. uses a team of inside sales representatives to perform the initial lead qualification. Qualified leads are then assigned to field sales representatives for further assessment and then they convert the leads into opportunities to pursue.

Here is an overview of how Vision Corp. processes leads:

1. A sales administrator imports the leads using the import macro you download from My Oracle Support.
2. Using an assignment rule you create, the application automatically assigns imported leads to inside sales representatives.
3. Inside sales representatives review the list of leads and select the leads they want to work on.
4. The inside sales representatives verify the information in each lead, check for potential duplicates, and answer a standard list of questions in a qualification template.
5. When leads meet the qualification criteria, then the inside sales representatives set the leads to the qualified status.
6. If the leads do not meet the criteria, then the inside sales representatives can retire them instead.
7. A qualified lead is automatically assigned by the application to sales territories of the field sales organization.
8. A field sales representative reviews the assigned leads and converts them to opportunities if it is fully qualified. Different sales teams may have different criteria to convert or retire a lead. The conversion process makes the representative doing the conversion the owner of the new opportunity and creates any new account and contact records. The lead is automatically set to a converted status and remains linked to the account and opportunity records.
How Inside Sales Accesses and Works Leads

Who can view a lead is restricted to:

- The person who imports the leads
- The members of the lead sales team
- The lead owner
- The managers of these people

The assignment rule you create as part of this use case assigns all inside sales representative to the sales teams of the imported leads. This assignment ensures that the inside sales representatives have continued access to the leads, but it does not assign them ownership of the leads. Salespeople become owners of a lead only when they accept a lead.

The figures and steps that follow describe sales representative activities in the Leads work area, aligning with the Vision Corp. use case.

Sales representatives work on leads in the Leads work area, as shown in the following figure. Callouts highlight key features of the page as described in the following table.
1. To find the imported leads they can work on, the inside sales representatives select the Unaccepted Leads list. You must create this list of imported leads during your setup.

2. Representatives accept ownership of the leads they want to work on, either by:
   - Selecting the Accept from the Actions list.
   - Or by drilling down on the lead name and clicking the Accept button in the Edit Lead page.

By accepting the lead, a representative becomes the lead owner and can now see the lead listed in the My Open Leads list.

3. Inside sales representatives check if the account and contact information in the lead duplicates information that’s already in Oracle Sales Cloud. In our use case, the representatives check for duplicates manually in the leads UI by selecting the Check for Duplicates action.

4. The representatives qualify the leads, guided by the questions you set up as part of a qualification template. Using the qualification template, while not mandatory, ensures everyone follows the same procedure for qualifying leads.

The following figure shows a screen capture of a sample qualification template, which is displayed in the Qualification tab (callout 1) on the Edit Lead page. Sales representatives answer the questions you provide (callout 2). These questions are organized in question groups, which serve as headings on the page. As they answer the questions,
users get visual feedback on the quality of the lead, using the ratings and color schemes you select during qualification template setup (callout 3).

5. When inside sales representatives set the lead status to Qualified, an assignment process assigns the lead to the appropriate sales territory. The process also adds the appropriate field sales representatives to the sales team.

6. The field sales representatives convert the lead to an opportunity by selecting the Convert from the Actions menu after viewing the lead.

7. Field sales representatives have a chance to rename the opportunity in the Convert window and change opportunity ownership, if required.
The following figure shows a screen capture of the Convert window.

![Convert Window](image)

Importing Leads

You can import leads either as net new leads, as leads linked to existing accounts and contacts, or you can create the new prospect accounts and contacts from your import.

Here are the main differences:

- **Net new leads**
  
  You import the account and contact as part of the lead object. You can use the Excel macro provided by Oracle to import these types of leads. Account and contact records are created when the sales representatives convert the leads to opportunities. The sales representatives qualifying the leads must manually check for any duplicate account and contact records.

- **Leads linked to existing accounts and contacts**
  
  You must use IDs to reference the existing accounts and contact record in your import file. You can use the IDs you generated in your account and contact import files or you can export IDs from your application. You cannot use the leads import Excel macro for this type of import.

This guide discusses only the import of net new leads. You must refer to the Understanding File-Based Data Import and Export guide to understand how to import the other types of leads.

Setup Overview

The following table outlines the setup steps required to set up the Vision Corp. leads use case covered in this chapter.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Create the assignment rule to assign the leads to the inside sales representatives who will qualify them.</td>
<td>Manage Sales Lead Assignment Rules</td>
<td>See the Setting Up the Assignment Rule for Assigning Leads topic in this chapter.</td>
</tr>
</tbody>
</table>
## Oracle Sales Cloud

### Getting Started with Your Sales Implementation

#### Chapter 15

## Setting Up Leads

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>Set two system profile options to enable lead assignment. Setting Lead Assignment Mode to Both turns on both rule-based and territory-based assignment. Setting the Assignment Rule for Rule Based Lead Assignment profile option tells the application which rule category to use.</td>
<td>Manage Sales Lead Profile Options</td>
<td>See the Enabling Lead Assignment topic in this chapter.</td>
</tr>
<tr>
<td>3</td>
<td>Before importing your leads, you can optionally change the values provided by Oracle for lead rank and the lead source channel. Salespeople can use lead rank, for example, hot or cold, to prioritize leads to work on next. The lead source channel indicates if the lead came from the web, an e-mail and so on.</td>
<td>Manage Set Enabled Lookups</td>
<td>See the Changing the Lead Rank and Lead Channel topic in this chapter.</td>
</tr>
<tr>
<td>4</td>
<td>Download the Excel macro and import mapping for leads from support.oracle.com upload the mapping to your application using the Manage File Import Mappings task, and import. You can import up to 1000 leads at a time by clicking a button in the macro.</td>
<td>Manage File Import Mappings</td>
<td>See the Importing Leads topic in this chapter.</td>
</tr>
<tr>
<td>5</td>
<td>Run the lead assignment process twice: the first time to assign the imported leads to inside sales and the second time to assign qualified leads to field sales. You can also schedule assignment process to run at regular intervals.</td>
<td>Manage Lead Processing Activities</td>
<td>See the Running the Lead Assignment Process topic in this chapter.</td>
</tr>
<tr>
<td>6</td>
<td>Create a list that inside sales representatives use to view the imported leads that are available for them to work on.</td>
<td>There is no task in the implementation project for this setup. Follow the instructions in the topic.</td>
<td>See the Creating a List of Unaccepted Leads topic in this chapter.</td>
</tr>
<tr>
<td>7</td>
<td>Create a lead qualification template. The template includes questionnaire you want inside sales to use as a guideline for qualifying the lead.</td>
<td>Manage Sales Lead Qualification Templates</td>
<td>See the Creating a Lead Qualification Template topic in this chapter.</td>
</tr>
<tr>
<td>8</td>
<td>Specify the qualification template you created as the template you want to appear in the lead by default. This is accomplished by setting the system profile option</td>
<td>Manage Sales Lead Administrator Profile Values</td>
<td>See the Selecting the Default Lead Qualification Template topic in this chapter.</td>
</tr>
</tbody>
</table>
### Setting Up Leads

**Step** | **Description** | **Task Name** | **Where to Get More Details**
---|---|---|---
| 9 | **Advanced Lead Qualification**
| | Enabled. | |

| **9** | Impersonate one of the inside sales representatives and one of the field sales representatives to test your setup. | There is no task in the implementation project for this setup. Follow the instructions in the topic. | See the Testing Your Leads Setup topic in this chapter. |

---

### Setting Up the Assignment Rule for Assigning Leads

You can use assignment rules to automatically assign your leads to sales resources or to sales territories. In this procedure, you set up a rule that assigns imported leads to sales resources, the inside sales representatives.

Creating the assignment rule involves the following three major steps:

1. Create a rule set.
2. Create the rule.
3. Publish the rule set.

#### Creating the Rule Set

You must create a rule set before you create your rule. The rule set makes it possible for you to have more than one rule for your lead assignment, if required. Create the rule set as follows:

1. Open the **Manage Sales Lead Assignment Rules** task from the implementation project, or by searching for the task by name in the Setup and Maintenance work area.
2. Select the **Sales Lead Resource Rule Category** from the **Category** list. You are assigning resources to the leads.
3. Create a rule set:
   - **a.** Click **Add Row** (plus sign icon) in the Rule Sets region toolbar.
   - **b.** Enter a rule set name in the Name field and an optional description.
   - **c.** Make sure that **All** is selected as the **Filter**.
     - The **All** setting ensures that all the inside sales representatives are assigned to all of the lead sales teams so each sales representative can work any of the leads you import.
     - If you selected **Random** as your filter value, then the inside sales representatives are assigned to the lead teams at random. Each representative would be assigned approximately to the same number of leads, but the representatives could not view and work on the leads assigned to the others.
   - **d.** Save.

#### Creating the Rule

Now create the rule to assign the inside sales representatives to all imported leads that are unqualified. Use the following steps:

1. With the rule set you just created selected, click **Create** (the plus sign icon) in the Rules region.
   - The Create Rule page appears.
2. Enter a rule name and an optional description.

3. In the Conditions region, make sure the **All conditions met** operator is selected for the **Rule Applies If** field.

4. Click **Add Row** (the plus sign icon).

5. Now enter the first of the two conditions. This first condition ensures that the rule only assigns imported leads.

   The following table lists the fields and entries to enter the condition.

<table>
<thead>
<tr>
<th>Field</th>
<th>Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object</td>
<td>Sales Lead</td>
</tr>
<tr>
<td>Attribute</td>
<td>Import Activity Identifier</td>
</tr>
<tr>
<td>Operator</td>
<td>Is not blank</td>
</tr>
</tbody>
</table>

   6. Click **Add Row** again and enter the second condition as described in the following table. This condition assures that the rule assigns only unqualified leads.

<table>
<thead>
<tr>
<th>Field</th>
<th>Selection</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object</td>
<td>Sales Lead</td>
</tr>
<tr>
<td>Attribute</td>
<td>Status</td>
</tr>
<tr>
<td>Operator</td>
<td>Equals</td>
</tr>
<tr>
<td>Value</td>
<td>Unqualified</td>
</tr>
</tbody>
</table>

   7. In the Action region, enter the names of the inside sales representatives who work the imported leads. To add each sales representative, do the following:

      a. Click **Select and Add** (plus sign icon).

         The Select and Add window appears.

      b. Search by name.

      c. Select the name.

      d. Click **OK**.

         Clicking **Apply** instead keeps the window open so you can add additional resources.

   8. Click **Save and Close**.

      You are returned to the Manage Sales Lead Assignment Rules page.

**Publishing the Rule Set**

For the rule to become active, you must publish the rule set after each change by clicking the **Save and Publish** button on the Manage Sales Lead Assignment Rules page. The application lists the day and time when the rule was last published.

The following table describes the UI fields and buttons highlighted in the subsequent figure.
### Callout

<table>
<thead>
<tr>
<th>Callout</th>
<th>Name in UI</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Name</td>
<td>Name of the rule set.</td>
</tr>
<tr>
<td>2</td>
<td>Rule Set Filter</td>
<td>The filter permits you to either assign all the resources in your rule to each lead sales team or to distribute the leads randomly among the resources.</td>
</tr>
<tr>
<td>3</td>
<td>Rules</td>
<td>Region from where you create the rules for the rule set.</td>
</tr>
<tr>
<td>4</td>
<td>Save and Publish</td>
<td>You must save and publish for your rules to become active.</td>
</tr>
</tbody>
</table>

The following figure shows a screen capture of the Manage Sales Lead Assignment Rules page highlighting key entries described in the table.

![Manage Sales Lead Assignment Rules](image)

### Enabling Lead Assignment

Use this procedure to enable both rule assignment and sales territory assignment by setting the two system profiles options described in the following table.

<table>
<thead>
<tr>
<th>System Profile Option Display Name</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Assignment Mode</td>
<td>Both</td>
<td>Specifies if you are using rules, sales territories, or both for assigning leads. Vision Corp. is using both.</td>
</tr>
<tr>
<td>Assignment Rule for Rule-Based Lead Assignment</td>
<td>Sales Lead Resource Rule Category</td>
<td>Specifies the rule category for the rule used for lead assignment.</td>
</tr>
</tbody>
</table>
To set these profile options, do the following:

1. Sign in as a setup user and open the Manage Sales Lead Profile Options task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.

   The Manage Administrator Profile Values page appears.

2. Enter the profile option name in the Profile Display Name field.

3. Click Search.

   The application displays the profile option information.

4. For the Assignment Rule for Rule-Based Lead Assignment profile, click Add (the plus sign icon) in the Profile Values region and select Site as the Profile Level. For the Lead Assignment Mode system profile option, this selection is already made for you.

5. In the Profile Values region, select the value from the Profile Value list.

6. Click Save and Close.

### Changing the Values for Lead Rank and Lead Channel

Optionally, you can change the values you use for lead rank and lead channel by editing their lookup values. Lead rank can be used by salespeople to prioritize leads to work on. The lead channel records the source of the lead. After you complete your edits, you must copy the edited values to the lead import macro.

Oracle includes the following predefined lead ranks in the lookup type Lead Rank (MKL_LEAD_RANK_SETID):

- Cold
- Hot
- Warm

Oracle includes the following predefined values for lead channel in lookup type Lead Channel (MKL_LEAD_CHANNEL_SETID):

- Direct Mail
- E-Mail
- Fax
- Marketing Cloud
- Phone
- Sales campaign
- Sales visit
- Social
- Company web site
- Wireless Message
- Model-based prediction
- Rules-based prediction
Use this procedure to change the existing values and to add new ones:

1. While signed in as a setup user, open the Manage Set Enabled Lookups task from the implementation project, or after searching for the task by name in the Setup and Maintenance work area. The Manage Set Enabled Lookups page appears.

2. In the Search region, enter either of the lookup type names Lead Channel or Lead Rank in the Meaning field and click Search.

The lookup type and the available values, called lookup codes, appear below.

3. You can change the lookup codes as follows:
   - For the existing values, you can change the wording displayed to the user by modifying the meaning or you can end date values you do not need.
   - You can add new values, by clicking New (the plus sign icon).

4. Click Save and Close when you are done.

5. If you made changes, then you must remember to enter the changes on the Lead Channel and Lead Rank worksheets in the lead import macro.

Importing Leads

Overview

You can import leads using the lead import macro, the file import feature, or web services depending on the type of lead and your business needs. Use the macro import covered in this section for importing up to 5000 net new leads at a time. Net new leads are leads your organization must verify before you want to enter them as records in your application. Importing net new leads does not automatically create account and contact records. Accounts and contacts are created only when salespeople convert them into opportunities.

Importing leads using the macro provided by Oracle involves the following three steps. The first two are required to get you ready.

1. You download two files from My Oracle Support: the macro and the mapping used by the macro for the import.
2. You upload the mapping to your Oracle Sales Cloud application.
3. You enter the lead data into the macro and import.

Note: You can modify the macro to import additional fields, including any fields you created. If you modify the macro, then you must create a new mapping to use in your import. The steps for modifying macros are not covered in this guide.

Getting Ready to Use the Lead Import Macro

Video

Watch: In this tutorial, you learn how to download the Excel macro provided by Oracle for importing leads into Oracle Sales Cloud and how to set up your application so you can use it. The content of this video is also covered in text topics.
Downloading the Mapping and Macro for Importing Leads
For importing leads, you must download both the Excel macro file and the accompanying mapping file. The files are available on My Oracle Support, in article Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1).

Follow these steps to download the files:

1. Sign in to support.oracle.com.
2. Search for 2229503.1.
3. Scroll down in the article to the Details region, locate the section appropriate to your application update version, and click on the links in the Excel Macro Files and Mapping Files columns to download the two files from the table.
4. Save the files to a folder on your computer.

The application saves import logs to this folder.

Uploading the Mapping for Lead Import
You must upload into the application the mapping file you downloaded earlier. You also must record the mapping ID. Use the following procedure:

1. While signed in as a setup user, navigate to the Setup and Maintenance work area. Open the Manage File Import Mappings task from the implementation project or after searching for the task by name.
   The Manage File Import Mapping page appears.
2. Click Import Mapping at the top of the page.
3. Click Choose File. Select the R13 Lead Import Macro Mapping file and click OK.
   The mapping is now listed at the bottom of the page.
4. You must enter the mapping number into the import macro. You can either record the number on the Manage File Import Mapping page by hand, or you can drill down on the mapping name and copy the number to your clipboard from the Edit Import Mapping page.

Entering Lead Data into the Macro and Importing

Video: Entering the Data

Watch: In this tutorial, you learn how to enter your leads data into the Excel macro provided by Oracle for importing leads. The content of this video is also covered in text topics.

Video: Importing

Watch: In this tutorial, you learn how to import the leads you entered in the Excel macro provided by Oracle. The content of this video is also covered in text topics.

Entering Lead Data into the Import Macro and Importing
Follow these steps to populate the lead import macro with your data and perform the import. You can import up to 5000 lead records at a time and must ensure that each import completes before you start another.

1. Open the R13 Lead Quick Import Macro file you downloaded earlier.
2. Make sure macros are enabled in Excel.
3. In the **Mapping** field, enter the mapping number you obtained earlier.

4. If you changed the lead rank or the lead channel lookup types, then enter the new values in the **Lead Rank** and the **Lead Channel** worksheets.

5. In the Template worksheet, enter your lead data. Note that most of the information is optional. The import requires just four pieces of information for each lead, but because the macro generates the required lead number after you click **Create Import Activity**, you must enter just three:

   - Lead name
   - Account name
   - Contact full name

However, your use case may require additional information. For example, you must include some contact information for your inside sales representatives to be able to qualify the lead. If you are assigning qualified leads using geographical sales territories based on the state where the business is located, as in our use case, then you must include the state in your data or have the inside sales representatives supply that information during the lead-qualification process.

The following table lists the columns and describes the values to enter.

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Number</td>
<td>Leave this required column blank. The macro generates the lead number automatically using the date and time. The application uses the lead number to identify the lead record for updates.</td>
</tr>
<tr>
<td>Lead Name</td>
<td>The lead name identifies the lead in the lists sales representatives see in the Leads work area. In the UI, the application automatically enters a lead name as a combination of the contact name and the date and time. You may want to follow the same practice in your import. Entry in this field is required.</td>
</tr>
<tr>
<td>Account Name</td>
<td>Organization name. Entry is required.</td>
</tr>
<tr>
<td>Contact Full Name</td>
<td>You must enter the contact’s first and last names separated by a space.</td>
</tr>
<tr>
<td>Job Title</td>
<td>Job title.</td>
</tr>
<tr>
<td>E-mail</td>
<td>Contact e-mail address.</td>
</tr>
<tr>
<td>Phone Country Code</td>
<td>Contact phone country code.</td>
</tr>
<tr>
<td>Phone Area Code</td>
<td>Contact phone area code.</td>
</tr>
<tr>
<td>Phone Number</td>
<td>Contact phone number with no spaces or delimiters.</td>
</tr>
<tr>
<td>Address 1</td>
<td>Contact address line 1. If you convert the lead to an opportunity, then the application uses the address entered in the contact address fields both as the contact address and the account address.</td>
</tr>
<tr>
<td>Address 2</td>
<td>Contact address line 2.</td>
</tr>
</tbody>
</table>
### What to Enter

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Address 3</td>
<td>Contact address line 3. This column (L) is hidden in the macro by default.</td>
</tr>
<tr>
<td>City</td>
<td>Contact address city.</td>
</tr>
<tr>
<td>State</td>
<td>Vision Corp. has set up geographical sales territories for the US, so you must enter the state for leads to be assigned.</td>
</tr>
<tr>
<td>Province</td>
<td>This column (O) is hidden in the macro.</td>
</tr>
<tr>
<td>ZIP Code</td>
<td>Postal code.</td>
</tr>
<tr>
<td>Country</td>
<td>The ISO two-letter code for the country.</td>
</tr>
<tr>
<td>Product Group</td>
<td>Enter the Product Group Reference Number. You can copy this number from the macro you used to import product groups.</td>
</tr>
<tr>
<td>Product</td>
<td>Product name you imported earlier. This column (S) is hidden in the macro by default. If you are importing a product interest for a lead, you cannot import a product group at the same time.</td>
</tr>
<tr>
<td>Lead Rank</td>
<td>You must use one of the standard values provided by Oracle in the macro, unless you changed them. The standard values are:</td>
</tr>
<tr>
<td></td>
<td>- Cold</td>
</tr>
<tr>
<td></td>
<td>- Hot</td>
</tr>
<tr>
<td></td>
<td>- Warm</td>
</tr>
<tr>
<td>Lead Channel</td>
<td>You must use one of the standard values provided by Oracle in the macro, unless you changed them. The standard values are:</td>
</tr>
<tr>
<td></td>
<td>- Direct Mail</td>
</tr>
<tr>
<td></td>
<td>- E-Mail</td>
</tr>
<tr>
<td></td>
<td>- Fax</td>
</tr>
<tr>
<td></td>
<td>- Marketing Cloud</td>
</tr>
<tr>
<td></td>
<td>- Phone</td>
</tr>
<tr>
<td></td>
<td>- Sales campaign</td>
</tr>
<tr>
<td></td>
<td>- Sales visit</td>
</tr>
<tr>
<td></td>
<td>- Social</td>
</tr>
<tr>
<td></td>
<td>- Company web site</td>
</tr>
<tr>
<td></td>
<td>- Wireless Message</td>
</tr>
<tr>
<td></td>
<td>- Model-based prediction</td>
</tr>
<tr>
<td></td>
<td>- Rules-based prediction</td>
</tr>
</tbody>
</table>

6. When you are done with your entries, click **Create Import Activity**.
7. If the **You must correct errors in your entries** message appears, then:

   a. Click **OK**

      The Error worksheet displays your errors.

   b. Click each error link in column D and make the correction on the Template worksheet.

   

   ![Note:](image)

   After you correct an error, you must click outside the field for the correction to be recognized.

   c. Click **Create Import Activity** again.

8. On the Login page, enter the following:

   - Host information for your environment. The host name is the portion of the URL between the `https://` and `/sales`. You must be signed in and navigate to one of the sales work areas to ensure the host name is correct. The name on the sign-in page and on setup pages is different.
   - Your user name
   - Your password

9. Click **Submit**.

    The application displays one of the messages listed in the following table.

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted successfully.</td>
<td>Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>Unable to connect to the server at this time.</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>Unable to submit the file import activity.</td>
<td>You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors work sheet to view the error details.</td>
</tr>
</tbody>
</table>

10. If your import activity was submitted successfully, then click **Activity Details**.

    The Activity Details window appears, listing the import activity name, its ID and its status.

    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is **Completed**.

11. Optionally, click **Generate Log** to save a file listing the leads that were imported.

### Running the Lead Assignment Process

In support of the Vision Corp. use case, you must run the assignment process twice. You run the process the first time to assign the imported leads to the inside sales representatives for lead qualification. Run the assignment process a second time
to assign the qualified leads to field sales for conversion to opportunities. You run the process by creating a lead processing activity as follows:

1. Open the task **Manage Lead Processing Activities** from the implementation project or after searching for the task by name in the Setup and Maintenance work area.

   The Lead Processing Activities page appears. This page lists all of your processing activities.

2. Click **Create Lead Processing Activity**.

   The Create Lead Processing Activity window appears.

3. To assign the leads you imported to inside sales for qualification, enter the parameters listed in the following table.

<table>
<thead>
<tr>
<th>UI Region</th>
<th>Field</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Details</td>
<td>Process Type</td>
<td>Assignment</td>
</tr>
<tr>
<td>Lead Selection</td>
<td>Status</td>
<td>Unqualified</td>
</tr>
<tr>
<td>Lead Selection</td>
<td>Assignment Status</td>
<td>Unassigned</td>
</tr>
<tr>
<td>Schedule</td>
<td>Schedule Mode</td>
<td>Immediate</td>
</tr>
</tbody>
</table>

4. Click **Submit**.

5. Now create and submit a second activity to assign the leads to field sales after the leads are qualified. Enter the parameters listed in the following table.

<table>
<thead>
<tr>
<th>UI Region</th>
<th>Field</th>
<th>Entry</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activity Details</td>
<td>Process Type</td>
<td>Assignment</td>
</tr>
<tr>
<td>Lead Selection</td>
<td>Status</td>
<td>Qualified</td>
</tr>
<tr>
<td>Schedule</td>
<td>Schedule Mode</td>
<td></td>
</tr>
</tbody>
</table>

   Run this activity on a repeating schedule to make sure the leads are transferred to field sales as soon as they are qualified by inside sales.

   To run the activity regularly, select **Repeats**, enter a frequency, a start date, and an end date far into the future. You must enter both a start date and an end date for the process to run.

6. You can monitor the processes on the Manage Lead Processing Activities page. This page lists all of your processing activities.
Creating a List of Unaccepted Leads

Use these steps to create a list to display the leads you imported in the Leads work area. Inside sales representatives use the list to review incoming leads and accept the leads they want to work on. After sales representatives accept a lead, it displays among the leads they own and no longer appears on the list.

Sales administrators and setup users can create lists for the whole organization or lists targeted to specific job roles. To create the lists, you must:

1. Get ready to create lists by creating and activating a sandbox and opening the Page Composer tool.
2. Create your list.
3. Publish the sandbox to make the list available for use.

Getting Ready to Create Lists

Follow these steps to create and activate a sandbox and get ready to start creating a list:

1. While signed in as a setup user, click your user name at the top right corner of the page, select Manage Sandboxes, and create and activate a sandbox:
   a. In the Manage Sandboxes window, click New (the plus icon).
   b. Enter a sandbox name in the Create Sandbox window and click Save and Close.
   c. Select the sandbox you just created and click Set as Active.

   The application displays a bar across the top of the window indicating the sandbox is active.

2. Navigate to the Leads work area.

3. Click your user name again and select Edit Pages.

   The Edit Pages window appears.

4. Select Site.

   All users will see the list among the available lists in the work area. However, only the inside sales representatives who are assigned to the imported leads and their managers can view the leads in the list.

   You can, instead, target the list to a specific job role by selecting Job Role and entering the job role. However, targeting the list specifically to inside sales representatives would require additional setup:
   a. You must also be assigned the job role so you can test the list. See the section on enabling testing in the Extending Sales guide for more details.
   b. Both inside sales and field sales representatives are assigned the same Sales Representative job role. If you wanted to target the list specifically to inside sales, then you would have to create your own job role as described in the Securing Sales guide.

5. Click OK.

   The Editing: User Interface bar appears at the top of the page indicating that you are in Page Composer.
The following screenshot shows the Sandbox bar (identified by callout 1) and the Page Composer bar (callout 2). The sandbox bar lists the name of the sandbox.

You are now ready to create the list. After you create and test the list, you must publish the sandbox to make your list available to your users.

Creating the List

With both the sandbox and the Editing: User Interface Page Composer toolbar displayed on the top of the page, follow these steps to create the list. You create the list by editing an existing list and saving it under a new name.

1. In the Leads work area, click Show Advanced Search (the filter icon) to the right of the List field.

   The Advanced Search pane appears.

2. From the Saved Search list, select the My Open Leads list to use as the starting point for creating a new one.

3. Add the Accepted field to your search criteria, by using the Add button at the bottom of the pane, then enter the search criteria listed in the following table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Operator</th>
<th>Entry</th>
<th>Explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Set</td>
<td>Equals</td>
<td>Records where I am on the team</td>
<td>The assignment rule you created assigns all the inside sales representatives to the lead sales team. The default selection, Records I Own, displays only leads where you are assigned as an owner. The imported leads do not have an owner until they are accepted by one of the inside sales representatives.</td>
</tr>
<tr>
<td>Name</td>
<td>Starts with</td>
<td>Leave blank.</td>
<td>Leave this field blank.</td>
</tr>
<tr>
<td>Status</td>
<td>Equals</td>
<td>Unqualified</td>
<td>Imported leads are unqualified by default.</td>
</tr>
<tr>
<td>Creation Date</td>
<td>After</td>
<td>Enter a date and time prior to the import.</td>
<td>Restricts search to improve performance. For example, you may restrict search to</td>
</tr>
</tbody>
</table>
### Field | Operator | Entry | Explanation |
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Accepted</td>
<td>Equals</td>
<td>No</td>
<td>Leads created in last 60 days depending on your typical lead life-cycle.</td>
</tr>
</tbody>
</table>

When they accept leads, inside sales representatives become lead owners and the lead drops off the list.

4. You can test your search by clicking **Search**.
5. When you are satisfied with the results, click **Save**.

The Create Saved Search window appears.

6. Enter a new name for the saved search. For example: **Unassigned Leads**.

You cannot reuse the names of the saved searches provided by Oracle with the application.

7. Make sure the **Run Automatically** option remains selected. Selecting this option runs the query each time a sales representative selects the list in the UI.

8. Make sure the **Set as Default** option is not selected. You do not want all sales representatives to see this list whenever they navigate to the leads work area.

9. Click **OK** to return to the Saved Searches window

### Publishing the Sandbox

To publish the sandbox, do the following:

1. Click the sandbox name.
2. Click **Exit Sandbox**.

   The Exit Sandbox window appears.

3. Click **Yes**.
4. Click your user name at the top right corner of the page and select **Manage Sandboxes**.
5. Click **Publish**.

### Creating a Lead Qualification Template

You can use the Lead Qualification template to set up questionnaires to guide your sales representative as they qualify leads. You can set up multiple qualification templates for different products, as needed.

To create the template, do the following:

1. Open the **Manage Sales Lead Qualification Template** task from the implementation project, or after searching for the task by name in the Setup and Maintenance Work area.

   The Manage Sales Lead Qualification Template page appears listing the predefined template provided by Oracle. You can use this template as a model for your setup.

2. Click **Create** (the plus sign icon).

   The Manage Assessment Template page appears.
Entering Basic Template Details

Enter the following in the Enter Details page:

1. Enter a template name. For example: **Imported Web Leads**.
2. Select **Lead** as the **Template Type**.
3. For the **Template Set**, select **Common Set**.

Sets make it possible for you to target different qualification templates for different business units, but the application covered in this guide uses only one business unit. For an explanation of how you can tailor Oracle Sales Cloud for multiple business units, see the Implementing Sales guide.

4. Click **Next**.

Configuring Ratings

Ratings group question responses in a template into different categories. There are three predefined ratings: Poor, Average, and Excellent. You can add your own ratings or modify the predefined ratings. When you are done, click **Next**.

Creating the Question Groups, Questions and Responses

Use the following steps to create the question groups, which serve as headings in the template, and the questions within each group:

1. Click **Create** (the plus icon) and select **Create Question Group**.
2. Enter a name, which appears as the heading for this group of questions, and click **Save and Close**.
3. Now create your questions for this group. For each question:
   a. Click **Create** (the plus icon) and select **Create Question**.
      The Create Question window appears.
   b. Enter the question text.
   c. Enter a weight indicating how important this question is in the qualification process. You have a chance to revisit and adjust the weights to all the questions at a later stage.
   d. Click **Save and Close**.
4. Enter the possible responses for each question:
   a. Enter the response, score and rating.
      The following table lists the response entries for a yes or no question, for example: **Did you reach the contact by phone?**

<table>
<thead>
<tr>
<th>Response</th>
<th>Score</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>100</td>
<td>Excellent</td>
</tr>
<tr>
<td>No</td>
<td>0</td>
<td>Poor</td>
</tr>
</tbody>
</table>

   b. When you complete entering your questions, you can reorder the questions by clicking **Move** (the double right arrow).
5. Click **Next**.
The Edit Question Weights pages appears.

Editing Question Weights, Configuring Score Ranges, and Associating Task Templates

Use the following steps to edit the question weights, configure score ranges, and associate task templates:

1. On the Edit Question Weights page, the weights in the **Weights** column for each question until the total equals 100.
2. Click **Save** and then **Next**.

The Configure Score Range Attributes page appears.

3. The application derives the score range for ratings using the scoring to response mapping in the questions and responses that you entered earlier. You can select the **Override Score Ranges** option to edit the automatically derived score ranges and set different start and end scores for the ratings. You can also use the **Graph Color** list to change the colors shown in the various score ranges.

The following figure shows the Configure Score Range Attributes page.

4. Click **Next**.

The Associate Task Templates page appears where you can add any task templates you have created.

Deploying the Qualification Template

When you are ready to deploy the qualification template, do the following:

1. Click **Save**.
2. Click **Deploy**.
3. Click **OK** to close the confirmation window.

The application displays any errors in setup. For example, if you did not enter question weights which total 100.

**Note:** You cannot edit many aspects of the template after you deploy it. You may have to copy the deployed template and edit the copy.

Selecting the Default Lead Qualification Template

To turn on lead qualification, you must specify which lead qualification template you want to use as the default by setting the system profile **Advanced Lead Qualification Enabled**. You can select a single template for use for the whole sales organization, display a different template depending on the product group in the lead, and you can assign specific templates to different users. The settings are not mutually exclusive. You can provide a template for the whole organization, but target different template to individual users or product groups.

To set the system profile do the following:

1. Sign in as a setup user and open the **Manage Sales Lead Administrator Profile Values** task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.

   The Manage Administrator Profile Values page appears.

2. Enter **Advanced Lead Qualification Enabled** in the **Profile Display Name** field.
3. Click **Search**.

   The application displays the profile option information.

4. In the Profile Values section, click **New**.

5. If you are using only one template, then select **Site** from the **Profile Level** list. The options are:
   - **Site**
     
     The same template is used for the entire organization unless you specify additional templates for product and user.
   - **Product**
     
     The template is used for a product group. All other product groups are assigned the template you specify at the site level.
   - **User**
     
     The template is used for the user you enter. All other users are assigned templates for the product or the site.

   Select the name of the template from the **Profile Value** list.

6. Repeat the previous steps for additional products and users.

7. Click **Save and Close**.

---

**Testing Your Leads Setup**

Test your leads setup by impersonating the inside sales representative to accept and qualify the lead and then impersonating the field sales representative to convert the lead to an opportunity.

**Impersonating the Inside Sales Representative**

1. Sign in as one of the inside sales representatives and navigate to the Leads work area.

2. Select the list of unaccepted leads you created.

   The list should contain all your imported leads.

3. Open one of the leads and click **Accept**.

   You should now be listed as the lead owner.

4. Click the **Sales Team** tab to make sure all the appropriate sales representatives are listed.

5. Click the **Qualification** tab.

   The tab displays the qualification template you created.

6. Answer the questions.

   If you must update the qualification template after your testing, you may have to create a copy, edit the copy, and publish it. If you do make a copy, you will also have to reset the Advanced Lead Qualification Enabled profile as well.

7. Make sure that the information in the lead you are qualifying is sufficient to assign the lead to the field service representative you are using for testing.

   In our use case, qualified leads are assigned to sales territories by state. Make sure that the contact address in the lead includes one of the states in the US that belong to the territory of the field sales representative you are using for testing.
8. Click **Qualify** to indicate the lead is qualified.

**Impersonating a Field Sales Representative**

1. Ensure that the assignment process you scheduled previously has successfully completed. If you have not run the assignment process, then you must run the process again, this time, immediately.
2. Sign in as the field sales representative who owns the territory the qualified lead is assigned to.
3. Navigate to the Leads work area.
4. Select the **Open leads where I am on the team** list.
5. Edit the lead.
6. From the **Actions** menu, select **Convert**.

   The Convert window appears.
7. Optionally, change the opportunity name to something more meaningful.
8. Click **Submit**.
9. Navigate to the Opportunity work area. The new opportunity should be listed in the My Open Opportunities list.
10. You can open the opportunity and view the created account and contact from there.
16 Setting Up Competitors

About Setting Up Competitors

The sales organization can track and analyze the impact competitors are having on sales by recording the competitors in each opportunity. By default, Oracle Sales Cloud requires salespeople to enter the primary competitor whenever they close an opportunity. Unless you changed that default, you must create the list of competitors to enable opportunity closing.

To create the list of competitors, you are only required to enter competitor names. However, you can track other information about competitors in the Competitors work area. The following table lists the information you can enter in the different tabs.

<table>
<thead>
<tr>
<th>Information You Can Enter</th>
<th>Competitor Work Area Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information about the strengths, weaknesses, opportunities, and threat level (SWOT)</td>
<td>SWOT</td>
</tr>
<tr>
<td>The product groups in the sales catalog the competitor is competing against.</td>
<td>Product Groups</td>
</tr>
<tr>
<td>Related documents</td>
<td>Attachments</td>
</tr>
<tr>
<td>Names of internal contacts who know the competitor.</td>
<td>Internal Experts</td>
</tr>
<tr>
<td>Geographical regions where the competitor is active based on the geography reference information you imported.</td>
<td>Geographies</td>
</tr>
<tr>
<td>Industries where the competitor is active based on the industry classification you are using.</td>
<td>Industries</td>
</tr>
</tbody>
</table>

The Opportunities tab automatically displays all of the opportunities where that competitor has been selected as the primary competitor.

Access to the Competitors work area is restricted to users with the Sales Administrator job role. However, sales managers and others in the sales organization can access preconfigured reports to view the effects of the competitors entered in opportunities.

Related Topics

- Sales Competitors: Overview
- Managing Sales Competitors: Procedures
Creating the List of Competitors

Use this procedure to create the list of competitors for selection in the Edit Opportunity page.

1. While signed in as a setup user, open the task **Create Competitors** in the implementation project. Alternatively, sales administrators and setup users can click the **Competitors** link available under the **Sales** heading in the Navigator.

   The Review Competitors page appears.

2. Click **Create**.

   The Create Competitor page appears.

3. Enter the competitor name in the **Organization Name** field.

4. You can enter a suffix, such as **Ltd.** or **Co.**, in the **Name Suffix** field.

   A suffix is automatically appended to the name in the application.

5. Select a threat level. Salespeople can use the threat level to filter their competitor searches.

6. Optionally, enter additional information about the competitor.

   Any additional information you enter is only visible in the Competitors work area. Only the competitor name is visible while selecting competitors in opportunities.

7. Click **Save and Close**.

You can enter additional competitor information when you edit the competitor.

**Related Topics**

- Managing Sales Competitors: Procedures
- Enabling Competitor UI Elements in Opportunities
- Viewing Competitor Information Outside Opportunities: Procedure
- Associating Competitors with Opportunities: Procedures
17 Setting Up Opportunities

Setup Overview

This chapter explains how to configure opportunities and import them. Your sales organization can use opportunities to standardize the sales process from the time a lead gets qualified to the final sale. You can provide salespeople with the best practices at each stage of the sales cycle, forecast sales, and track sales outcomes.

Complete the setups outlined in the following table. You can open the setup tasks from the Set Up Opportunities folder implementation project unless noted otherwise.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Configure the sales method you want salespeople to follow.</td>
<td>• Manage Sales Methods and Sales Stages • Configure Opportunities</td>
<td>See the Configuring Sales Methods and Sales Coach topic in this chapter.</td>
</tr>
<tr>
<td></td>
<td>By configuring a sales method, you can provide salespeople with the best practices at each stage of the sale from opportunity creation to close. Within each sales stage, you can set up action items and provide recommended documents, such as collateral to show to the customer. The recommended actions and documents appear in the Sales Coach section of the opportunity UI. The Standard Sales Process sales method supplied by Oracle works without modification. However, you can modify the sales method to suit your needs. You can change the default Standard Sales Process to the sales method you created on the Configure Opportunities page. The page also sets the required system profile options for the opportunity closing behavior.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Specify the default sales process for sales people to follow and configure opportunity closing behavior.</td>
<td>Configure Opportunities</td>
<td>See the Specifying the Default Sales Process and Configuring Opportunity Closing Behavior topic in this chapter.</td>
</tr>
</tbody>
</table>
### Step 1

When salespeople open opportunities, the application automatically enters a default close date for the opportunity 20 days after the opportunity creation date.

You can use the Configure Opportunities task to specify a different sales process, make the required entries optional, and set a different default close date.

### Step 2

Optionally, configure opportunity statuses.

**Task Name:** Manage Sales Status

**Where to Get More Details:** See the Configuring Opportunity Statuses topic in this chapter.

### Step 3

Optionally, configure the list of win/loss reasons salespeople enter when they close opportunities.

**Task Name:** Manage Set Enabled Lookups

**Where to Get More Details:** See the Configuring the List of Win/Loss Reasons topic in this chapter.

### Step 4

Import opportunities using the Excel macro provided by Oracle.

You download the Excel macro and import mapping for opportunities from document 2229503.1 on support.oracle.com upload the mapping to your application using the Manage File Import Mappings task, and import. You can import up to 1000 opportunities at a time by clicking a button in the macro.

**Task Name:** Manage File Import Mappings

**Where to Get More Details:** See the Downloading and Using the Opportunity Import Macro topic in this chapter.

---

### Configuring Sales Methods and Sales Coach

#### Video

**Watch:** This tutorial shows you how to modify the supplied opportunity sales methods and sales stages to fit your business requirements. The content of this video is also covered in text topics.
About Setting Up Your Sales Methodology for Opportunities

You can guide salespeople through a structured sales process, called a sales method, as they pursue an opportunity from the initial qualifying stage to closing the deal. At each stage of the sales method, you can list suggested actions, assign tasks, and provide supporting documents and interactive questionnaires.

Oracle provides several predefined sales methods which you can modify to your needs. These include:

- **Accelerated Sales Process**
  A sales process for deals which involve a single decision maker and short time-frame.

- **Standard Sales Process**
  A sales process designed for longer sales cycles, where decisions are made by committee.

Although you can create multiple sales methods for different sales situations and products by following the procedures outlined in the Implementing Sales guide, you can provide one sales method for all opportunities by default. If you want salespeople to choose the sales method they want to use, then you must use Application Composer to display the Sales Method field in the UI. See the Extending Sales guide for details.

The Standard Sales Process, which is appropriate for the high tech company Vision Corp., divides the opportunity sales cycle into the following seven sales stages.

1. Qualification
2. Discovery
3. Building Vision
4. Presentation
5. Agreement
6. Negotiation
7. Closed

For each sales stage, you can specify different options and actions for salespeople to follow, including those listed in the following table. The callout numbers refer to the Edit Sales Stage window regions in the figure following the table.

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
<th>Where You Make Your Entries</th>
<th>Callout Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set the default win probability</td>
<td>If you decided to automatically include opportunities in forecasts based on a win probability, then you may want to set a default win probability to ensure that opportunities are not left out of the forecast by accident.</td>
<td>Edit Sales Stage page header</td>
<td>1</td>
</tr>
<tr>
<td>Specify how many days an opportunity can remain in the sales stage before it’s considered stalled</td>
<td>The number of stalled opportunities are highlighted in the Stalled Deals infolet.</td>
<td>Edit Sales Stage page header</td>
<td>1</td>
</tr>
<tr>
<td>Suggest actions and provide supporting documents</td>
<td>Suggest the actions you want salespeople to take and make available any supporting documents they need. These appear in the Sales Coach region in the opportunity UI.</td>
<td>Process Steps and Recommended Documents regions in the Edit Sales Stage page</td>
<td>2 and 4</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
<td>Where You Make Your Entries</td>
<td>Callout Number</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
<td>-----------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>Make opportunity fields required.</td>
<td>For example, you may want to make the selection of a sales method required when a salesperson creates an opportunity. For forecasting, you may want to make the Win Probability and Close Date required.</td>
<td>Additional Required Fields region in the Edit Sales Stage page</td>
<td>3</td>
</tr>
<tr>
<td>Automatically generate tasks, appointments, and other activities.</td>
<td>Activities are generated from the templates you assign to a sales stage and appear in the Activities tab in the opportunity UI.</td>
<td>Activity Templates region in the Edit Sales Stage page</td>
<td>5</td>
</tr>
<tr>
<td>Provide interactive questionnaires, called assessments, to help salespeople make decisions.</td>
<td>Assessments can provide recommendations based on the answers to a set of questions. Assessments are generated from the assessment template you associate with the sales stage and are available in the Assessments tab of an opportunity.</td>
<td>Assessment Templates region in the Edit Sales Stage page</td>
<td>6</td>
</tr>
</tbody>
</table>
The following figure shows a screen capture of the Edit Sales Stage page for a sample sales stage. Callout numbers refer to the different UI regions described in the previous table.

**Suggesting Actions and Documents for the Sales Coach**

The process steps and recommended documents you provide for a sales stage appear in the Sales Coach region of the Edit Opportunity UI. The process steps appear as action items. Salespeople can open documents from the Recommended Documents column.

The following table identifies the two regions on the Sales Coach page highlighted by the callouts in the figure.

<table>
<thead>
<tr>
<th>Sales Coach Region Name</th>
<th>Callout Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action Items</td>
<td>7</td>
</tr>
<tr>
<td>Recommended Documents</td>
<td>8</td>
</tr>
</tbody>
</table>
The following figure shows a screen capture of the Edit Opportunity UI for a sample opportunity with the callouts described in the previous table.

The process step name you enter appears as the action item link in the Sales Coach. The text you enter appears as a process step. The following figure shows a partial screen capture of the Edit Sales Stage page highlighting the Process Step region.
The following figure shows how the step you entered appears to users when they click on the action item link in Sales Coach..

**View Action Item: Gather High Level Information**

Your primary goals in this phase is to:

- Interview the prospect
- Determine budget and decision maker executives
- Determine influences
- Discover Competitors in the account
- Determine the buying process of the prospect
- Determine pursuit

Leverage the attached guide and assessment template to determine value.

**Related Topics**

- Adding Task and Assessment Templates to Sales Stages
Creating and Editing Sales Methods and Stages

Use the following procedure to edit an existing sales method, including one of those predefined by Oracle, or to create a new sales method entirely.

Creating or Editing Sales Methods

1. While signed in as a setup user, open the Manage Sales Methods and Sales Stages task from the implementation project. Alternatively, setup users or sales administrators can search for the task by name in the Setup and Maintenance work area.

   The Manage Sales Methods page appears listing the existing sales methods.

2. Edit a sales method by clicking on its name or click **Create**.

   The Create Sales Method or Edit Sales Method page appears.

3. Unless you are implementing your solution in multiple business units and need to enable different sales methods for different business units, leave the default value of **Common Set** for the **Set** field. The Getting Started with Your Sales Implementation guide does not cover the setup of multiple business units.

4. Enter a name for the sales method and an optional description. These entries are not visible to salespeople by default, but can be made visible when you configure the UI.

5. To provide a default close date for opportunities when they are created, enter a number of days in **Close Window**.

   Create or edit the sales stages for the sales method as described in the following section.

6. Save your changes.

   **Note:**
   
   - The **Enable Revenue Line Set Capability** option is used only for multiple business unit implementations.
   - You can use the **Disable** option to remove any unused sales methods from use. You cannot delete sales methods after you create them.

Creating or Editing Sales Stages in a Sales Method

Use the following procedure to create or edit sales stages for a sales method.

1. Edit a sales stage by clicking on its name or click **Create**.

2. Enter basic information about the sales stage, including predefined values for win probability and analytics reports. The following table lists and describes the fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Stage name visible in the UI.</td>
</tr>
<tr>
<td>Phase</td>
<td>Select a classification of the sales stage.</td>
</tr>
<tr>
<td></td>
<td>You can define the sales stage phases themselves by using the Manage Sales Stage Phase Codes task from the Setup and Maintenance work area.</td>
</tr>
<tr>
<td>Description</td>
<td>Description visible in the UI.</td>
</tr>
<tr>
<td>Status</td>
<td>Use the status of <strong>Open</strong> for all stages representing opportunities that are still in progress.</td>
</tr>
</tbody>
</table>
### Field Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Order</td>
<td>Enter a number for the order of this sales stage in the sales method.</td>
</tr>
<tr>
<td>Quota Factor</td>
<td>Enter any number in this field. This number is used only for legacy reports, but entry is required.</td>
</tr>
<tr>
<td>Disable</td>
<td>Select the Disable option to remove any unused sales stages from view. You must not disable sales stages after they are used in opportunities.</td>
</tr>
<tr>
<td>Win Probability</td>
<td>Enter a default win probability for opportunities in this stage.</td>
</tr>
<tr>
<td>Duration</td>
<td>The number of days this stage should last. When an opportunity is in a sales stage longer than the duration, the opportunity is considered stalled. Stalled opportunities appear on the Stalled Deals Infolet and underlying report.</td>
</tr>
<tr>
<td>Stalled Deal Limit</td>
<td>This field is no longer in use.</td>
</tr>
</tbody>
</table>

If you are using win probability as the criterion for including opportunities in forecasts, then having the application prepopulate a win probability ensures that opportunities of the right stages are included in the forecast. For example, if you are automatically forecasting all opportunities with 70 percent win probability or more, then you can set up the win probability predefined values listed in the following table. This setup ensures opportunities in the Agreement, Negotiation, and Closed stages are included in forecasts.

<table>
<thead>
<tr>
<th>Sales Stage</th>
<th>Win Probability</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualification</td>
<td>10</td>
</tr>
<tr>
<td>Opportunity</td>
<td>20</td>
</tr>
<tr>
<td>Building Vision</td>
<td>30</td>
</tr>
<tr>
<td>Presentation</td>
<td>50</td>
</tr>
<tr>
<td>Agreement</td>
<td>70</td>
</tr>
<tr>
<td>Negotiation</td>
<td>90</td>
</tr>
<tr>
<td>Closed</td>
<td>100</td>
</tr>
</tbody>
</table>

4. Upload any documents you want to provide in Sales Coach in the Recommended Documents region.
5. Add any fields you want to make required for opportunities in the Additional Required Fields region.
6. Add any assessment templates you have created in the Assessment Templates region. The assessment templates create interactive questionnaires available in the Assessments tab in the Edit Opportunity page.
7. Add any activity templates you have created in the Activity Templates region. The activity templates can automatically create tasks and appointments which appear in the Activities tab of the Edit Opportunity page.
8. Save your changes.
Configuring Opportunity Behavior

About the Default Opportunity Closing Behavior

Salespeople can close an opportunity when the deal is either won, lost, or abandoned for some reason by setting the opportunity to a closed status.

The following figure shows a screen capture of a portion of the Edit Opportunity page to illustrate the default application behavior:

- The application sets the close date to 20 days after the opportunity is created if you did not enter a different period in the Close Window field during sales method setup. Callout 1 shows the location of the Close Date field.
- When salespeople select one of the closed statuses (Won, Lost, or No Sale) (callout 2), they must enter a win or loss reason and a competitor (callouts 3 and 4).
Specifying the Default Sales Process and Configuring Opportunity Closing Behavior

You can modify the default behavior of opportunities as described in the following table.

<table>
<thead>
<tr>
<th>Default Opportunity Behavior</th>
<th>How You Can Change It</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunities follow the Standard Sales Process sales method provided by Oracle.</td>
<td>You can select a different sales method or one that you created.</td>
</tr>
<tr>
<td>Oracle provides three sales methods:</td>
<td></td>
</tr>
<tr>
<td>• Standard Sales Process (the default)</td>
<td></td>
</tr>
<tr>
<td>• Accelerated Sales Process</td>
<td></td>
</tr>
<tr>
<td>• Line Set-Enabled Sales Process</td>
<td></td>
</tr>
<tr>
<td>Salespeople are required to enter a win or loss reason for an opportunity when they close it.</td>
<td>You can make the entry of the win or loss reason optional.</td>
</tr>
<tr>
<td>Salespeople must also enter at least one competitor before closing opportunities.</td>
<td>You can make the competitor entry optional.</td>
</tr>
<tr>
<td>The close dates for opportunities are set to 20 days after the opportunity creation date.</td>
<td>You can change the default close date.</td>
</tr>
</tbody>
</table>

To specify the default sales process and modify the default opportunity behavior, do the following:

1. While signed in as a setup user, open the Configure Opportunities task from the implementation project. Alternatively, you can open this task from the Setup: Sales page, by clicking the Quick Setup (gears) icon for the Opportunities functional area.

   The Configure Opportunities page appears.

2. You can:
   - Select a different sales process from the Default Sales Method list.
   - Make the entry of the competitor and win or loss reason optional by selecting the No option for each.
   - Enter a different number of days in the Default Opportunity Close Date field.

3. Click Save and Close.

Modifying Opportunity Statuses

The application comes with four predefined opportunity statuses: Lost, No Sale, Open, and Won. Use the following procedure to add new statuses or modify the existing ones.
1. Open the **Manage Sales Status** task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area. The Manage Sales Statuses page appears. The following figure shows a partial screen capture of the Manage Sales Statuses page.

![Manage Sales Statuses](image)

2. To add a new status:
   a. Click **Add** (the plus sign icon).
   b. Enter a new value in the **Status Code** field.
   c. Enter a new value in the **Status** field. This value displays in the opportunity pages.
   d. Select the **Active** check box.
   e. Select from one of the predefined values for **Status Category**.

3. You can modify an existing status by selecting its row.

4. Save your changes.

### Modifying the List of Win/Loss Reasons

The application comes with predefined win/loss reasons that salespeople select when they close an opportunity. Use the following procedure to add new reasons or modify the existing ones.

The predefined win/loss reasons include:

- Customer not ready
- Good lead
- Install base
- Lost to competition
- Lost to internal development
- Lost to no decision
- No bandwidth
- No budget
• Other
• Price
• Product
• Relationship
• Track record

Use the following steps to modify the win/loss reasons:

1. Open the Manage Set Enabled Lookups task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.

The Manage Set Enabled Lookups page appears.

2. In the Lookup Type field, enter MOO_SETID_WIN_LOSS_REASON.

3. Click Search.

The following figure shows the Lookup Codes region with a few of the preconfigured reasons.

4. You can add a new status in the Lookup Codes region, as follows:

   a. Click Add (the plus sign icon).
   b. Enter an internal name in the Lookup Code field. No spaces permitted.
   c. Select Common Set from the Reference Data Set list.
   d. Select the Enabled check box.
   e. Optionally, enter a start and end date.
   f. Enter the wording salespeople see as they close an opportunity in the Meaning field.

5. You can modify an existing win/loss reason by selecting its row.

6. Save your changes.
Importing Opportunities

You can use an Excel macro provided by Oracle to speed up the import of opportunities and their revenue lines. You can import up to 5000 records at a time and you must ensure that an import completes before starting another. This section explains how to download the macro and the mapping file, populate the macro with your data, and import.

Note: You can modify the macro to import additional standard fields and fields you created. If you do, then you must create a new mapping to use in your import. The steps for modifying macros are not covered in this guide.

Downloading the Macro and Mapping File for Opportunity Import

Do the following to download the macro and its mapping:

1. Sign in to support.oracle.com.
2. At the top right-hand side of your screen, search for 2229503.1.
3. In the Details section of the Oracle Sales Cloud: Getting Started with Your Implementation: Quick Import Macros (Doc ID 2229503.1) document, locate the section appropriate to your application update number, and download the two files listed in the following table from the Excel Macro Files and Mapping Files columns:

<table>
<thead>
<tr>
<th>File Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>R13 Opportunity Quick Import Macro</td>
<td>An Excel macro which you populate with opportunity and revenue line information</td>
</tr>
<tr>
<td>R13 Opportunity Import Macro Mapping</td>
<td>The mapping the application uses for the import.</td>
</tr>
</tbody>
</table>

4. Save both files to a folder on your computer. The macro saves log files to this same folder during your import.

Uploading the Import Opportunity Mapping File

You must upload the mapping file you downloaded earlier into your application and record the mapping number. The mapping number tells the macro which mapping to use for the import.

Follow these steps to upload the file:

1. While signed in as a setup user, navigate to the Setup and Maintenance work area. Open the Manage File Import Mappings task from the implementation project or after searching for the task by name.

   The Manage File Import Mapping page appears.

2. Click Import Mapping at the top of the page.

3. Click Browse and select the R13 Opportunity Import Mapping file you downloaded.

   The mapping is now listed at the bottom of the page.

4. You must enter the mapping number of this mapping into the opportunity import macro. You can either record the number on the Manage File Import Mapping page by hand, or you can drill down on the mapping name and copy the number to your clipboard from the Edit Import Mapping page.
Entering Data into the Opportunity Import Macro and Importing

Enter the data into the macro as follows:

1. Open the R13 Opportunity Quick Import Macro file.
2. If you have not enabled macros, then Microsoft Excel warns you that macros have been disabled. In this case, do the following:
   a. Click Options.
      The Microsoft Office Security Options window appears.
   b. Select the Enable this content option and click OK.
3. In the Mapping field at the top of the macro, enter the mapping number you copied.
4. The currency is set to USD. If you are using a different corporate currency, then enter its code in the Currency Code field.
5. If you modified opportunity statuses, then click the Status worksheet and enter the status codes and statuses in the appropriate columns.
6. If you modified the win/loss reasons, then click the Win/Loss Reason worksheet and enter the codes and values in the appropriate columns.
7. On the Competitors worksheet, click Populate Competitors from Server.
8. In the Login dialog, do the following:
   a. Enter the host name. The host name is in the portion of the URL between https:// and /sales.
   b. Enter the user name and password.
   c. Click Submit.

The Competitors worksheet is populated with the competitors and their IDs. The following figure shows a partial screen capture of the Excel macro Competitors worksheet.

The macro uses this list to validate your entries in the Templates worksheet.
9. Click the Resource EMail to ID Mapping worksheet.
10. Click **Populate Resource Attributes from Server** to populate the worksheet with information about the resources you will assign as owners of the opportunities you are importing.

   The Login window appears with the user and password information you entered previously.

11. Click **Submit**.

   The worksheet populates with the resource data.

12. Click the **Template** worksheet, and enter your opportunity data as described in the following table.

   Entry is required in the following columns:
   
   - Opportunity Name
   - Account Number
   - Owner E-Mail
   - Expected Close Date
   - Status
   - Creation Date
   - Last Update Date
   - Created By
   - Last Updated By

   Entries in additional columns may be required, depending on your settings and what type of opportunity you are importing. The following tables lists and describes the columns.

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Number</td>
<td>Leave this required column blank until you finish entering all of your opportunity data in the Template worksheet. The macro generates the opportunity number automatically using the date and time when you click <strong>Generate Opportunity Number</strong>. You must generate the opportunity numbers before entering opportunity revenue lines. The opportunity number is used to link the opportunity to the revenue lines and to identify opportunities during updates.</td>
</tr>
<tr>
<td>Opportunity Name</td>
<td>Entry is required. The opportunity name identifies the opportunity in lists displayed in the Opportunity work area.</td>
</tr>
<tr>
<td>Account Number</td>
<td>Enter the account number. You can copy the account number from macro you used to import accounts.</td>
</tr>
<tr>
<td>Owner E-Mail</td>
<td>Enter the e-mail of the opportunity owner. The e-mail must be one of the e-mail addresses on the Resource EMail to ID Mapping worksheet.</td>
</tr>
<tr>
<td>Win Probability</td>
<td>Optionally, enter a win probability. Depending on your setup, a win probability can determine if an opportunity is included in a forecast. For example, you can decide to include all opportunities with a win probability greater than 70 percent in your forecasts. See the Setting Up Forecasting chapter for details.</td>
</tr>
<tr>
<td>Expected Close Date</td>
<td>Enter the expected close date in the following format MM/DD/YYYY. The expected close date determines which forecast includes the opportunity. See the Setting Up Forecasting chapter for details.</td>
</tr>
</tbody>
</table>
### What to Enter

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Select the status of the opportunity from the list of values or enter one of the statuses manually. For example, Open, Won, Lost, or No Sale.</td>
</tr>
<tr>
<td>Primary Competitor</td>
<td>Select the primary competitor from the list of values or enter one of the valid company names manually. For opportunities with a close date, entry in this field is required depending on the system profile option setting you made earlier.</td>
</tr>
<tr>
<td>Win/Loss Reason</td>
<td>Using the list of values, enter a win or loss reason for a closed opportunity. If you enter an actual close date, then a win/loss reason is required depending on your system profile option setting.</td>
</tr>
<tr>
<td>Actual Close Date</td>
<td>For closed opportunities, enter the date the opportunity was closed in the following format MM/DD/YYYY. If you enter a close date, then you must also enter a primary competitor and a win/loss reason, depending on the system profile option settings you made earlier.</td>
</tr>
<tr>
<td>Creation Date</td>
<td>Enter the opportunity creation date. The required format is YYYY-MM-DD'T'HH:MM:SSSSS which stands for Year-Month-Date'T'Time Hour: Min:Sec + UTC. You can enter the date as MM/DD/YYYY and have the macro convert your entry into the required format. For example, your entry 2017/01/2005 converts to 2017-01-05T00:00:00000+0000.</td>
</tr>
<tr>
<td>Last Update Date</td>
<td>Enter the date the opportunity was last updated. This date field requires the same format as the creation date. You can enter MM/DD/YYYY and have the macro convert your entry to the required format.</td>
</tr>
<tr>
<td>Created By</td>
<td>Enter the Party Number of the user who created the opportunity. You can copy the Party Number from the Resource EMail to ID Mapping worksheet. See the chapter on Importing Accounts and Contacts for details.</td>
</tr>
<tr>
<td>Last Updated By</td>
<td>Enter the Party Number of the user who last updated the opportunity. You can copy the Party Number from the Registry ID column in the file you exported earlier to obtain the Party ID. See the chapter on Importing Accounts and Contacts for details.</td>
</tr>
</tbody>
</table>

13. Click **Generate Opportunity Number**. The macro creates the opportunity numbers.

14. Click the **Revenue Line** worksheet and the revenue lines for the opportunities you entered. Each line represents one opportunity revenue line. You can enter multiple lines for each opportunity. The columns are described in the following table.

<table>
<thead>
<tr>
<th>Column</th>
<th>What to Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Opportunity Number</td>
<td>Enter the opportunity number linked to the revenue line you are entering. You can copy the number from the Opportunity Number column in the Template worksheet.</td>
</tr>
<tr>
<td>Revenue Number</td>
<td>Leave this column blank. This unique identifier for the revenue line number is automatically populated by the macro when you initiate the import by clicking <strong>Generate Import Activity</strong>.</td>
</tr>
<tr>
<td>Product Group Internal Name</td>
<td>This column identifies the sales catalog product group the customer is interested in purchasing. Enter the Product Group Reference Number from the macro you used to import product groups. See the Setting Up the Sales Catalog chapter for details.</td>
</tr>
</tbody>
</table>
Column | What to Enter
--- | ---
| Each revenue line can have either a product group or a product. You cannot enter both.

Product Number | This column (D) is hidden in the macro. You can enter the Product Number to indicate the specific sales catalog product the customer is interested in purchasing. You can copy the product number from the product import macro you used earlier or you can view the product numbers in the Products work area.
You cannot enter a product if you entered a product group. A revenue line cannot have both.

Status | Select the status of the opportunity from the list of values or enter one of the statuses manually. For example, Open, Won, Lost, or No Sale.

Owner E-Mail | Enter the e-mail of the opportunity revenue line owner. The e-mail must be one of the e-mail addresses on the Resource EMail to ID Mapping worksheet.

Quantity | Enter the number of products or product groups that the customer is interested in.

Estimated Price | Enter the estimated price per unit for the product group or product.

Amount | Leave this column blank. The macro automatically calculates the amount when you import.

15. When you are done with your entries, click the Template worksheet and click Create Import Activity.
The Login dialog appears displaying the host name, user name, and password you entered earlier.

16. Click Submit.
17. If the **You must correct errors in your entries** message appears, then:
   a. Click OK
   The Error worksheet displays your errors.
   b. Click each error link in column D and make the correction on the Template worksheet.

   ✷ **Note:** After you correct an error, you must click outside the field for the correction to be recognized.
   c. Click Create Import Activity and Submit again.

18. If the macro data is validated without errors then, the macro displays one of the messages listed in the following table:

<table>
<thead>
<tr>
<th>Message</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>The file import activity was submitted successfully.</td>
<td>Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.</td>
</tr>
<tr>
<td>Unable to connect to the server at this time.</td>
<td>You may have entered an incorrect host.</td>
</tr>
<tr>
<td>Unable to submit the file import activity. Check log for details.</td>
<td>You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors work sheet to view the error details.</td>
</tr>
</tbody>
</table>
19. If your import activity was submitted successfully, then click **Activity Details**.

The Activity Details window appears, listing the import activity name, its ID and its status.

- If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
- If your import completed successfully, then the status listed is **Completed**.

20. Optionally, click **Generate Log** to save a file listing the opportunities that were imported.

### Validating the Imported Opportunities

You can validate the opportunities you imported using advanced search in the Opportunities work area as follows:

1. Sign in as a salesperson with the Sales Administrator job role. Sales administrators have broad access to sales data.
2. Navigate to the Opportunities work area.
3. Click **Advanced Search**.

The Advanced Search panel appears.

The following figure shows a partial screen capture of the Opportunities work area showing the Advanced search panel. The following table lists the callouts which identify the location of the fields in the panel.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Advanced Search</td>
</tr>
<tr>
<td>2</td>
<td>Saved Search</td>
</tr>
<tr>
<td>3</td>
<td>Close Period</td>
</tr>
<tr>
<td>4</td>
<td>Close Date</td>
</tr>
</tbody>
</table>
4. From the **Saved Search** list, select **Close Date**.
5. From the **Close Period** list, select **All**.
6. In **Close Date**, enter a period which covers the close dates you imported.
7. Click **Search**.

The list of opportunities appears matching your criteria.
18 Setting Up Oracle Social Network

About Setting Up Oracle Social Network

If you want users to easily share information on opportunities, accounts, and other sales objects, then you must enable the Oracle Social Network for Oracle Sales Cloud for those objects and specify which attributes you want to display on the wall. Oracle Social Network is a secure, private social network that integrates with Oracle Sales Cloud and connects you with all your colleagues. You can use Oracle Social Network to discuss projects, plans, and issues. Everyone can benefit from the collective experience and make better-informed business decisions.

When a record is shared, the application automatically generates a wall and displays the object attributes that you select during the setup. Any changes in the attributes for the shared record are automatically listed on the wall. The following figure shows a screen capture of the Social tab showing the wall for the fictitious Server Upgrade opportunity.

Oracle Sales Cloud users with access to the opportunity can join the conversation in the Social tab of the record and invite others.

All users who are part of the conversation, including those without access to the opportunity record or to Oracle Sales Cloud, can access what’s posted on the wall either through the Social work area in Oracle Sales Cloud or through the Oracle Social Network UI.

The following figure shows a screen capture of the same opportunity information as seen in the Social work area of Oracle Sales Cloud.
You can automatically share and create a wall for all records or require salespeople to share individual records manually by clicking **Share** on the Social tab. Oracle recommends that you set objects to be shared manually.

The following figure shows the Social tab when you select the manual option, before the opportunity is shared. The tab displays a message that the opportunity is not shared and the **Share** button.
Enabling Objects for Sharing on Oracle Social Network

Use the procedures in this topic to enable objects for sharing on Oracle Social Network and to specify which object attributes are displayed on the conversation wall.

Note: Do not enable objects while you are in a sandbox.

Enabling an Object

To enable an object, do the following:

1. While signed in as a setup user, open the task **Manage Oracle Social Network Objects** from the implementation project. Alternatively, you can search for the task by its name in the Setup and Maintenance work area.

   The Manage Oracle Social Network Objects page appears.

2. Scroll down to one of the appropriate groupings for the object you want to share and expand the grouping.

   The following table lists key sharable objects and the groupings where they’re located. You can only share information for objects you have implemented.

<table>
<thead>
<tr>
<th>Grouping</th>
<th>Object Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applications Common Components</td>
<td>Activity</td>
</tr>
<tr>
<td>Common CRM</td>
<td>Business Plan</td>
</tr>
<tr>
<td>Enterprise Contracts</td>
<td>Contract</td>
</tr>
<tr>
<td>Lead Management</td>
<td>Sales Lead</td>
</tr>
<tr>
<td>Mobile Sales</td>
<td>Activities Public</td>
</tr>
<tr>
<td>Opportunity Management</td>
<td>Opportunity</td>
</tr>
<tr>
<td>Partner Management</td>
<td>Partner</td>
</tr>
<tr>
<td>Sales</td>
<td>Reference</td>
</tr>
<tr>
<td>Sales</td>
<td>Sales Competitor</td>
</tr>
<tr>
<td>Service</td>
<td>Service Request</td>
</tr>
<tr>
<td>Trading Community Model</td>
<td>Account</td>
</tr>
<tr>
<td>Trading Community Model</td>
<td>Contact</td>
</tr>
</tbody>
</table>
3. Select the object and click **Enable Object**.
   
   The Enable Object window appears.

4. Select either the **Manual** or the **Automatic** option and click **OK**.
   
   Manual, the recommended setting, requires the salesperson to share each record manually. The Automatic setting automatically shares each record and creates the discussion wall.

5. On the Manage Oracle Social Network page, click **Save**.

You must now enable attributes for the object.

### Enabling Object Attributes

To enable object attributes, do the following:

1. Under Business Objects, select the object that you want to enable attributes for.

2. Under Attributes, click **New**.
   
   A list of attributes for the object appears.

3. Select the **Enabled** option for the attributes that you want to appear on the wall for the object.

4. Click **OK**.
   
   The **No Warnings** icon (a green check mark) appears in the object’s **Status** column.

5. Click **Save**.
   
   A confirmation message appears showing the progress of the setup process.

6. When the process is complete, click **OK**.

### Validating Your Changes

To verify that you have enabled an object for sharing on Oracle Social Network, navigate to any record for the object to see whether the record displays the **Social** tab at the bottom of the page.

The following figure shows a partial screen capture of the tabs on the page with the Social tab highlighted.
19 Setting Up Sales Quotas

About Setting Up Sales Quotas

You can set up quotas and use them to measure the achievement of your sales teams by comparing the quotas to actual metrics such as revenue. This chapter covers the basic setup for quota management using the UI only. It doesn't cover quota import or advanced quota calculation features.

Prerequisites

You must complete the following before you can set up sales quotas:

1. Set up the accounting calendar as covered in the Setting Up the Accounting Calendar chapter. Quotas can be set for the year as well as for periods defined in the calendar. After the calendar is set up you can add years to it, but any other changes to the calendar can break quota features. A report calculated by time period is one example.
2. Set up sales territories as described in the Setting Up Sales Territories and Assignment chapter. Each salesperson eligible to receive a quota must be assigned to an active territory. Quota calculations rely on territory coverage. If you plan to use quota calculations, then make sure territories have dimensional coverage defined.

Setup Overview

Perform the following tasks to set up sales quotas:

1. Optionally, create seasonality factor groups.
   Seasonality applies percentages to split a quota over months or quarters to factor in seasonal fluctuations. Seasonality factor groups can be associated with quota plans or specific territories to account for variations in sales seasonality among different territories. Instead of entering quotas for each period of the year, you could rely instead on seasonality to split your annual quota into period quotas.
   For details, see the Creating the Seasonality Factor Groups section in this chapter.
2. Create a sales quota plan for your fiscal year. One plan per fiscal year is required for tracking quotas for the entire territory hierarchy for that fiscal year.
   The quota plan must be activated before you can allocate sales quotas. For details, see the Creating a Sales Quota Plan topic.
3. Allocate sales quotas starting from the root territory down the sales territory hierarchy.
   For details, see Allocating Sales Quotas.
4. Optionally, create a sales goal to track sales volume or sales visits or any company-defined quota.
   For details, see Creating a Sales Goal.

Setting Up Sales Quotas

You can create seasonality factors to automatically split yearly quota into period quotas according to known seasonal fluctuations. You will also create a sales quota plan for the year and begin the quota setting process.
Create Seasonality Factor Groups

Follow these steps to create seasonality factor groups for a given year. The groups are useful when your territories have different seasonality expectations. The sum of all seasonality factors must total 100 percent. You can create more than one seasonality group.

1. Sign in as a setup user or sales administrator.
2. Open the Manage Sales Quota Seasonality Groups task from the implementation project. Alternately, you can search for the task by name in the Setup and Maintenance work area.

The Manage Seasonality Factor Groups page appears.

4. In the Seasonality Factors region, enter the factor percentages for time periods, as shown in this table. Percentages must add up to 100.

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Factor Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quarter 1</td>
<td>10</td>
</tr>
<tr>
<td>Quarter 2</td>
<td>20</td>
</tr>
<tr>
<td>Quarter 3</td>
<td>30</td>
</tr>
<tr>
<td>Quarter 4</td>
<td>40</td>
</tr>
</tbody>
</table>

5. Click Save and Close.

Create a Sales Goal

A sales revenue goal is the target revenue expected from a salesperson. This goal is automatically assigned to every territory owner during the annual quota planning process. You can use the following steps to create additional sales goals, such as sales volume or sales visits, if you want to assign other types of quotas to your salespeople.

1. While signed in as a setup user, open the Manage Sales Goals task from the implementation project. Alternatively, sales administrators can open the task from the Quotas work area.
2. In the Search Results region, click Create.
3. Name the goal Sales Volume.
4. Add the description: Number of products sold.
5. For Unit of Measure, select Quantity.
6. Save and close.
Create a Sales Quota Plan

Follow these steps to create a sales quota plan:

1. While signed in as a setup user, open the Manage Sales Quota Plans task from the implementation project. Alternately, setup users and sales administrators can navigate to the Quotas work area and click the task name there. The Manage Sales Quota Plans page appears.
2. Click Create.
3. In the Sales Quota Plans table, enter the sales quota plan information, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Fiscal Year 2017 Sales Plan</td>
<td>Corporate Sales Quota Plan for Fiscal Year 2017</td>
</tr>
<tr>
<td>Year</td>
<td>2017</td>
<td></td>
</tr>
<tr>
<td>Calculate Default Territory Quota</td>
<td>Deselect. If selected, the application calculates the quotas for each of the territories using the default territory quota formula.</td>
<td></td>
</tr>
<tr>
<td>Track</td>
<td>Select. Only one plan can track quotas for the year.</td>
<td></td>
</tr>
<tr>
<td>Copy Quotas From</td>
<td>Leave Blank. After creating your first sales quota plan, copy a previous plan for a quick way to create a new plan.</td>
<td></td>
</tr>
</tbody>
</table>

The following figure shows the Create Sales Quota screen with the example data.
4. Click Save and Close.

5. In the Details region, on the Options tab, select Standard for the **Seasonality Factor Group** field you created earlier.

   The following figure shows the Sales Quota Plan Options region of Manage Sales Quota Plans.

6. Click Save.

7. With your new quota plan selected in the list of plans, click the Activate button.

   The Enter Activation Date dialog box appears.

8. Set the activation to right now plus a few minutes in the future.

9. Click OK.

   The initial status is Pending Activation. You must refresh the page to verify that the status has changed to Active.

10. Upon activation, sales managers can sign in to the application and begin allocating quotas to their teams. Click Synchronize if you suspect the territory hierarchy for quotas isn't current.

## Allocate Sales Quotas

Use the following steps to allocate sales quotas to territories. You must allocate quotas to each territory from the top of the territory hierarchy down. You can allocate a quota to a territory only after you allocate the quotas for all the territories higher in the territory hierarchy.

1. You are signed in as the setup user. A sales administrator can also perform these steps.
2. In the Navigator, click Quotas.
3. The Manage Sales Quotas page appears. If not already selected, select your recently created and activated quota plan: **Fiscal Year 2017 Sales Plan**.
4. In the Edit Sales Quotas region, verify that the territory quotas and owners’ quotas are zero.
5. If not already selected, select the **US Product Sales** territory, which is the root territory in the hierarchy.
6. Enter a territory quota amount and a resource quota amount for the year for the whole US Product Sales organization. Enter a territory quota amount and a resource quota amount for the year for the whole US Product Sales organization. Enter **20,000,000**.
7. Click Publish and verify that the status changed from Not Published to Published.
8. For each child territory of the US Product Sales territory, enter a territory quota amount and an owner’s quota amount as shown in the following table:
<table>
<thead>
<tr>
<th>Territory Name</th>
<th>Territory Quota and Owner’s Quota</th>
</tr>
</thead>
<tbody>
<tr>
<td>Central</td>
<td>10,000,000</td>
</tr>
<tr>
<td>East</td>
<td>5,000,000</td>
</tr>
<tr>
<td>West</td>
<td>6,000,000</td>
</tr>
</tbody>
</table>

9. Select the parent territory Product Sales and click **Details** for the territory. The Details table shows the rollup total for the child territories and the variance from the US Product Sales quota.

10. Click **Save**.

11. Click the Territory Quota tab and verify that as part of the publish process, seasonality was automatically applied to split the annual quota into period quotas.

12. Select the West territory and do the following:
   a. On the Territory Quota tab, enter quotas for each period. They must add up to the annual quota amount.
   b. On the Resource Quota tab, enter period quota amounts for the Sales Revenue Goal for the owner of the territory.
   c. In the Resource Quota table, click **Add Row**.
   d. From the **Resource Name** list, select the owner of the territory.
   e. Select the sales goal **Sales Volume**.
   f. Enter a quota quantity for the sales volume goal, 12,000,000. The start and end dates are automatically applied.
   g. Click **Apply Seasonality**.
   h. The factors for the Standard seasonality group display. Click **OK**. The West seasonality factors are applied to the quantity you entered and are distributed over time periods.
   i. You can publish at this point, but for now click **Save and Close**.

13. In the Manage Sales Quotas page, select the **West** territory and click **Publish**.

   ✌️ **Note**: If the Publish button is disabled, this could be the result of one of the following:
   o You did not publish the parent territory.
   o You must own the parent territory in order to publish a quota.
   o The territory is excluded. To see if a territory is excluded, select **Columns, Exclude** from the **View** menu in the Edit Sales Quotas region.
   o The territory was already published. You cannot republish a territory at the bottom of the hierarchy.

14. Verify that the status is Published.

    The application notifies the territory owner and the analyst that the territory was published.

15. Click **Save**.

    The following table lists common publishing errors and their solutions.

<table>
<thead>
<tr>
<th>Error</th>
<th>Steps to Resolve</th>
</tr>
</thead>
<tbody>
<tr>
<td>You cannot publish quota for the territory West because the territory has revenue quota assigned prior to the territory quota start date.</td>
<td>a. Select the parent territory of West. In this example, this is US Product Sales. b. Click <strong>Details</strong> to navigate to Edit Sales Quotas page.</td>
</tr>
</tbody>
</table>
Scheduling Quota Processes

Your active quota plan must reflect the latest territory hierarchy. Sales managers or administrators frequently make changes to active territories directly, using territory proposals, or through web services. Only if you update territories using a territory proposal are the territory hierarchies synchronized automatically. Schedule synchronization to run frequently to provide the latest structure for allocating quotas.

Perform the following steps to schedule the Synchronize Quotas process to run daily.

1. Sign in as a setup or sales administrator user.
2. Open the navigator.
3. In the Tools menu section, click Scheduled Processes.
   The Schedule New Process dialog appears.
5. For the Type field, select Job.
6. In the name field list, click Search.
7. Search for Synchronize Quotas.
8. Select Synchronize Quotas and click **OK**.

The Process Details page appears.

9. In the Parameters region, select the sales quota plan.

10. Click **Advanced**.

11. In the Schedule tab, select **Using a schedule**.

12. Select the **Daily** frequency.

13. Change the start date to when you want to start running the process, and select the time of day when you want it to run.

14. Change the end date to a future date.

15. Use the Notification tab to add notifications to specific people when the process completes.

16. Click **Submit**.
Setup Overview

Your sales organization can automatically forecast opportunities by sales territory within each forecasting period and managers can adjust those forecasts as required. During setup you can specify the forecasting windows and set other parameters for your organization.

Before you can set up the forecasting, you must complete the following prerequisite setups covered in previous chapters:

- You must set up the accounting calendar as described in the Setting Up the Accounting Calendar and Corporate Currency chapter.
- You must create your sales territory hierarchy. Oracle recommends setting the profile option Assignment Submission at Save Enabled (MOO_OPTY_ENABLE_AUTO_ASGN) to Yes, as described in the Setting Up Sales Territories and Assignment chapter. Forecasts are generated by territory and roll up the territory hierarchy. The owner of a territory submits a forecast to the owner of the parent territory.

Read the About Forecasting topic and complete the setups outlined in the following table. You can open these setup tasks from the Define Sales Forecasting Configuration folder in the implementation project.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>On the Select Forecasting Options page you:</td>
<td>Select Forecasting Options</td>
<td>See the Generating Forecast Submission Windows and Setting Forecasting Options topic in this chapter.</td>
</tr>
<tr>
<td></td>
<td>• Generate the forecast dates and forecast submission windows your organization will use. This task is required.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Specify criteria for including opportunities in the forecast.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Enable managers to adjust forecasts by product group rather than by territory.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>If you enabled forecast adjustment by product group, then you can enable managers to adjust the forecasts by the quantity of products in addition to revenue.</td>
<td>Manage Standard Lookups</td>
<td>See the Enabling Forecast Adjustments By Product Quantity topic in this chapter.</td>
</tr>
<tr>
<td></td>
<td>To enable the quantity adjustment, you use the Manage Standard Lookups task to edit the ORA_ZSF_SHOW_METRICS lookup type and enable the ORA_QUANTITY lookup code.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
About Forecasting

Your sales organization can automatically forecast opportunities by sales territory within each forecasting period and managers can adjust those forecasts as required. In the Select Forecasting Options page, you specify how far in advance and how frequently you want to forecast and generate the forecasting submission windows during which your sales organization can adjust forecasts.

What’s Included in a Forecast

The application automatically includes in each forecast all won opportunities in a sales territory with close dates that fall within the forecast period. Lost opportunities are never included in forecasts. Only sales territories that have the Forecast Participation attribute set to revenue can participate in forecasts.

You can forecast additional opportunities that meet the criteria you specify in the Unadjusted Forecast Criteria region of the Select Forecasting Options page. For example, you can decide to include all opportunities with a win probability greater than 70 percent.

You can set up your Sales Method to ensure that opportunities are not left out because of incomplete data entries. For example, you can make entries in the Win Probability and Close Date fields required for the later stages of the sales process and you can have the application automatically prefill the win probabilities themselves when salespeople move an opportunity to a particular sales stage.

By entering a default of 70 percent for opportunities in the Agreement sales stage, for example, you ensure that all opportunities in the Agreement stage are included unless sales representatives change the win probability manually.

You can also configure opportunities to always assign territories when they are saved, to ensure that a sales territory is always associated with the opportunity. You assure territory assignment by setting the profile option Assignment Submission at Save Enabled (MOO_OPTY_ENABLE_AUTO_ASGN) to Yes as described in the Setting Up Sales Territories and Assignment chapter.

Each user who participates in the forecasting process must own a sales territory, or be delegated forecasting visibility into a territory. By default, the application creates one forecast for all opportunity revenue line items. You can enable forecasting on individual line items separately by following instructions in the Implementing Sales guide.

Sales Representative Forecasts

Sales representatives navigate to the forecast they want to review on the Forecasts work area landing pad.

The following figure shows a screen capture of the Forecasts work area landing pad page with sample data. The page displays a bar chart showing the amounts for forecasts, won revenue, and open pipeline. The page also displays an indicator
showing in percentage of quota attainment with a numeric summary. The page indicates if the forecast is submitted, how it was changed, and how much pipeline remains to be submitted.

Clicking **Review** displays the list of opportunities included in the forecast for the assigned territory within the active forecast time period.

The following figure shows a screen capture of a Review Sales Forecast page with sample data for the salesperson’s territory. The information includes information about the forecast amounts, the forecast window, won revenue, and open pipeline. The page also includes links to opportunities included in the forecast.
Sales representatives edit any of the opportunities by clicking their names. While editing opportunities, salespeople can manually exclude or include opportunities from the forecast by altering the win probability and the close date. If enabled on the Select Forecasting Options page, users can also make a selection from the **Include in Forecast** list.

The following figure shows a screen capture of the Edit Opportunity page. Callout 1 shows the location of the Include in Forecast list.
When sales representatives are satisfied with their forecast numbers, they click **Submit** on the Review Sales Forecast page. Submitting a forecast takes a snapshot of the opportunity information in the forecast and indicates to managers that they can review and adjust the forecast.

**Sales Manager Forecast Review and Adjustment**

Managers navigate to the forecast period they want to review on the Forecasts work area landing pad and click **Edit**. Managers are users who own a parent sales territory that has one or more child territories rolling up through the territory hierarchy. Managers can adjust forecasts on dates that fall within one of the forecast submission windows you generate on the Select Forecasting Options page.

The following figure shows a screen capture of the Forecasts work area landing pad page and sample data for a manager. The page is very similar to the page a salesperson sees.

On the Edit Forecast page Territories tab, managers can view at a glance which subordinates have submitted their forecasts and the trend of the latest updates.

The following figure shows a screen capture of a section of the Edit Forecast page for a manager. A green check mark, indicates a salesperson submitted her forecast (highlighted by callout 1). A green up arrow (callout 2) indicates she revised it upwards since her last forecast.
Depending on your setup, managers adjust the submitted forecasts either by territory on the Territories tab (the default) or by product on the Products tab.

If you want to have managers adjust forecasts by product rather than territories, then you must enable the Products tab on the Select Forecasting Options page. If you do not enable the Products tab, then it does not appear in the Edit Forecast page at all.

Regardless of setup, managers can always adjust opportunity lines on the forecast items tab. The adjustments to forecast items are then reflected on the territories and products tabs.

The following figure shows a screen capture of the Products tab on the Edit Forecast page. The image shows a sample sales catalog hierarchy, which extends four levels down to the individual product. Callout 1 highlights a product forecast line selected for adjustment.
Although you can enable adjustment at any product group level in your sales catalog, Oracle recommends enabling one level only. Enabling one level makes it possible to adjust forecasts for all the product groups immediately below your root catalog level. The adjustments that managers make are visible to themselves and to their own managers after they submit their forecasts.

By default, product group forecast adjustment is by revenue, but you can enable forecast adjustment by the quantity of products in a product group. See Enabling Forecast Adjustments By Product Quantity topic for details.

The following figure shows a screen capture of the Edit Forecast page Products tab with the forecast adjustment by quantity enabled. The page shows forecast quantities instead of dollar amounts.
The adjustments are highlighted by icons with details available on hover. The sales managers see their own adjustments. The following figure shows a partial screen capture of a forecast seen by a manager with the window which displays on hover for an adjusted forecast.
Managers higher up the management chain see their own adjustments and those made by their subordinates. The following figure shows a partial screen capture of a sample forecast with the window showing the amount adjusted by subordinates and the unadjusted forecast amount.
Enabling Forecasting

When you enable forecasting, you have a schedule of quarterly forecasts that your sales organization submits monthly. The forecast periods extend one year into the future. Opportunities are added to territory forecasts according to dates and criteria. Background processes are scheduled to run periodically to keep your forecast up to date. You can modify these initial settings at any time.

To enable forecasting:

1. Navigate to the Select Forecasting Options page.
2. Select **Enable Forecasting**.
3. Click **Submit**.
4. Background processes run to generate your forecasts. When they complete, you can work in your forecasts. You can also navigate to Select Forecasting Options and make changes to options and to forecast period dates.

**Settings that Generate the Forecast Submission Windows**

The following table shows the initial settings in the Forecast Period Parameters region used to generate your forecast submission windows.

<table>
<thead>
<tr>
<th>Field</th>
<th>Explanation</th>
<th>Provided Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forecast Period</td>
<td>Each forecast includes only those opportunities set to close in the forecast period.</td>
<td>Quarter</td>
</tr>
<tr>
<td>Adjustment Period</td>
<td>This read-only field displays the type of period you selected when you set up your accounting calendar. Typically and for Vision Corp. this is a month.</td>
<td>This field is not editable.</td>
</tr>
<tr>
<td>Forecast Frequency</td>
<td>The number of submission windows you want for each forecast period.</td>
<td>3</td>
</tr>
<tr>
<td>First Forecast Due Date</td>
<td>The date you want the first submission window to end relative to the forecast period. The application takes the forecast snapshot at the end of the day.</td>
<td>For the first forecast submission window to end on the last day of the first month in each quarter, you see 31 days <strong>After the forecast period start date</strong>.</td>
</tr>
<tr>
<td>First Territory Freeze Date</td>
<td>The number of days before the end date when you want the submission window to start. Any sales territory changes after this freeze date are ignored and applied only to subsequent forecasting windows.</td>
<td>For the forecast submission windows to start at the beginning of each month, the number provided is 31.</td>
</tr>
<tr>
<td>Number of Concurrent Forecasts</td>
<td>A concurrent forecast is where two or more forecast periods can both be updated at the same time.</td>
<td>This field is set to 1 and the scheduled forecasts are generated with no gaps in between forecasts freeze dates and due dates. The freeze date of the first forecast is set to the due date of the next scheduled forecast.</td>
</tr>
<tr>
<td>Number of Scheduled Periods</td>
<td>The number of forecast periods you want to view. Managers can only adjust the forecast for the current period during the submission windows you generated, but you can view the forecasts for subsequent periods.</td>
<td>The number of forecast periods is set to 4 for the whole year.</td>
</tr>
</tbody>
</table>
Forecasting Options

The following options were set when you enabled forecasting: To set forecasting criteria:

1. Opportunity items that match the forecasting criteria are added to the forecast according to their scheduled close dates. The provided unadjusted forecast criteria is win probability greater than or equal to 70 percent.

2. Selecting the **Enable Forecast Criteria Override** option makes it possible for salespeople or their managers to include or exclude an opportunity from a forecast regardless of its win probability. It was not selected for you when you enabled forecasting. Select the option if you are following the Getting Started use case. Then salespeople can make a selection from the Include in Forecast list while editing an opportunity.

3. The **Enable overlay forecasting** option is deselected.

4. The **Enable Product Totals** option was selected for you. Users can adjust forecasts by product rather than by territories. Selecting this option displays the Products tab in the Edit Forecasts window where users can make the adjustments.

5. The number of sales catalog levels you can edit in the Products tab is set to 2 in the Product Hierarchy Depth field.

6. Pipeline and Closed Revenue metrics were enabled. The Forecasts landing page displays a Forecast Overview chart that compares your forecast with won revenue and open pipeline. It also displays a second bar chart that shows your forecast by time periods.

Enabling Forecast Adjustments By Product Quantity

If you enabled forecast adjustments by product in the Select Forecasting Options window, you can permit sales managers to adjust forecasts by editing the product quantity in addition to the revenue (quantity times price).

To enable the quantity adjustment, you edit the ORA_ZSF_SHOW_METRICS lookup type and enable the ORA_QUANTITY lookup code.

**Enabling Forecast Adjustment by Product Quantity**

1. Navigate to the Setup and Maintenance work area and search for the Manage Standard Lookups task.

2. Click the task name link in the search results.

3. Search for the lookup type **ORA_ZSF_SHOW_METRICS** or the meaning **Forecast metric options**.

4. Highlight the row containing this lookup type.

5. In the Lookup Codes region, find the lookup code **ORA_QUANTITY** and select **Enabled**.

6. Click **Save and Close**.

Quantity is now enabled for selection in the **Show** list on the Edit Forecast page.
21 Getting Started with Sales Prediction

About Sales Prediction

You can use Oracle Sales Cloud to predict future sales opportunity revenues, provide product recommendations, and generate leads based on historical sales data and rules you create. You can use rules to create product recommendations, generate leads, or both, even if your application does not yet contain the historical sales data required for data model analysis.

For example, if the US Department of Education provides tax incentives for the education industry that may benefit your sales, then you can create a rule to recommend a product for every education account. You can also use the rule to generate leads automatically. If you don’t use the rule, then you have to manually create a lead for every account.

The product recommendations are displayed under the Top Recommendations heading in the Products section of the Account Overview page. The following figure shows a partial screen capture of the page with sample data.

The sales prediction application creates the recommendations by evaluating the rule whenever a user views the account. If you change the prediction rule, then the recommendations are updated automatically. If you generate leads, the leads are automatically assigned for qualification based on the assignment process you have set up either using sales territories or assignment rules.
Setup Overview

Setting up a sales prediction rule and generating leads based on the rule recommendations requires two steps that you must perform while being signed in as a user with the Sales Analyst job role.

1. Create a rule to recommend a product for every education account in North America.
   See Setting Up Sales Prediction Rules in this chapter for details.

2. Generate leads based on recommendations from the Generate Leads process.
   See Generating Leads from Sales Prediction Rules in this chapter for details.

Related Topics

- Sales Prediction: Overview
- Working with Sales Prediction Features

Setting Up Sales Prediction Rules

Use the Configuring Prediction Rules procedure as a guide for setting up a rule to automatically generate leads based on different attributes of your accounts.

In this example, a sales analyst at Vision Corporation wants to generate a lead for every education account because the US Department of Education is providing new tax incentives for the industry.

Configuring Prediction Rules

Perform the following steps to configure a prediction rule:

1. Sign in as a sales analyst, and select Recommendations from the Sales heading in the Navigator.
   The Customer Asset Analysis page appears.

2. Click Manage Rules from the graphic panel.
   The Manage Rules page appears.

3. Click Create Recommendation.
   The Create Recommendation page appears.

4. Enter the required rule criteria, such as the Rule Name, and specify the Rule Folder. You also select the products and customers you want to target.

   Note: You must enter at least one product or product group for the rule and a percentage value for the propensity of customers whom you expect to purchase the green server product.
See the following figure that shows the Edit Recommendation screen.

5. Click **Save and Close**.
   The Manage Rule page appears. Activating a rule automatically generates recommendations for each matching account. The recommendations appear on the Account Overview page.
   You are now ready to generate leads that are based on the recommendations created for each matching customer.

**Related Topics**
- Generating Leads Using Models and Rules: Worked Example

**Generating Leads from Sales Prediction Rules**

You can generate leads based on recommendations from the Generate Leads process. If you generate leads that are based on recommendations, then they’re assigned automatically based on lead assignment rules you created previously.

Perform the following steps to generate leads from a sales prediction rule:

1. While signed in as a setup user or a sales analyst, select **Recommendations** under the **Sales** heading in the Navigator.
   The Recommendations page appears.
2. In the Tasks region, under the Leads section, click **Generate Leads**.
3. Click **Create**.
4. Complete the fields as required. The following table lists the fields and provides sample values to generate leads based on the sample prediction rule.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Create Sales Leads for Education Industry</td>
</tr>
<tr>
<td>Record Type</td>
<td>Account</td>
</tr>
<tr>
<td>Generated By</td>
<td>Prediction Rules</td>
</tr>
<tr>
<td>Production Rule Folders</td>
<td>Fuse Demo Rules</td>
</tr>
<tr>
<td></td>
<td>If there are no Rule Folders available from the drop-down list, then</td>
</tr>
<tr>
<td></td>
<td>click the Create list item to create your own rule folder.</td>
</tr>
<tr>
<td>Maximum Number of Recommendations per Customer</td>
<td>5</td>
</tr>
<tr>
<td>Ranked By</td>
<td>Likelihood to buy</td>
</tr>
<tr>
<td></td>
<td>Enter a percentage value for the propensity of customers whom you</td>
</tr>
<tr>
<td></td>
<td>expect to purchase the green server product.</td>
</tr>
<tr>
<td>Select Option</td>
<td>By Profile</td>
</tr>
<tr>
<td>Country</td>
<td>United States</td>
</tr>
</tbody>
</table>

5. Click **Continue**.

The Create Predictor Lead Generation Process page appears.

6. Click **Advanced** and select to run **As soon as possible** option.

7. Click **Submit** and then click **OK** from the Confirmation dialog box.

On the Generate Leads page, you will see the report icon in the **View Report** column after the leads preview process has completed successfully.

8. Click the report icon for your Lead Generation Process job.

9. Preview and select leads that you want to generate from the Preview Leads page.

You can select multiple leads and save. When you’re ready with all your selections, you can generate leads.

10. Click **Generate Leads**.

Depending how you have setup your lead assignment process, the leads are assigned to the appropriate salespersons for follow-up.

Related Topics

- Generating Leads Using Models and Rules: Worked Example
## 22 Integrating Google Gmail and Calendar

### Setup Overview

Integrating Google Gmail with Oracle Sales Cloud makes it possible for sales professionals to use Google Gmail and Calendar to manage their e-mail, contacts, and appointments from within Gmail and share data easily with Oracle Sales Cloud. 

Read the About Integrating Google Gmail and Calendar with Oracle Sales Cloud topic to get an idea how the integration works and then complete the setups outlined in the following table. You can open the Oracle Sales Cloud tasks from the implementation project. Installing the Oracle Sales Cloud for Gmail Chrome extension is done for each user separately.

<table>
<thead>
<tr>
<th>Step</th>
<th>Description</th>
<th>Task Name</th>
<th>Where to Get More Details</th>
</tr>
</thead>
</table>
| 1    | To turn the integration on, you must set the two following system profile options to Yes:  
  - Gmail Appointment Synchronization Enabled  
  - Gmail Contact Synchronization Enabled | Manage Administrator Profile Values | See the Turning on Contact and Appointment Synchronization topic in this chapter. |
| 2    | Run the Synchronization Between Sales Cloud and Gmail process on a regular schedule to keep contacts and appointment information updated.  
By default, the application synchronizes all the contacts in the My Favorite Contacts list (all of the contacts that a user marks as favorite) and all the activities in the All Open Activities list (all the open appointments where the user is listed as a resource). Individual users can select different lists to synchronize by editing the settings in the Oracle Sales Cloud for Gmail Chrome extension. | Synchronization Between Sales Cloud and Gmail | See the Running the Contact and Activity Synchronization Process topic in this chapter. |
| 3    | Install the Oracle Sales Cloud for Gmail extension in Chrome using the URL provided in My Oracle Support document Oracle Sales Cloud for Gmail Chrome Extension (Doc ID 2188228.1). | You download and install the extension in the Chrome browser. | See the Installing the Oracle Sales Cloud for Gmail Extension topic in this chapter. |
About Integrating Google Gmail and Calendar with Oracle Sales Cloud

Using the Oracle Sales Cloud for Gmail extension, users can:

• Know when the sender and anyone copied on an e-mail are already contacts in Oracle Sales Cloud and get the latest information about those contacts
• Add new contacts to Oracle Sales Cloud and keep all contacts in Google Contacts synchronized
• Share all important e-mails to accounts, contacts, opportunities, and leads, so they are visible to everyone who needs to know from within Oracle Sales Cloud
• Synchronize Google calendar appointments with the different calendars in Oracle Sales Cloud ensuring that everyone in your organization is aware of how customer is being engaged and when

Architecture

The Oracle Sales Cloud for Gmail extension consists of two parts:

• A side panel that appears whenever users are editing an e-mail or a calendar appointment in Chrome. The side panel displays information about the relevant contacts from Oracle Sales Cloud and permits users to create contacts and share e-mails and appointments with Oracle Sales Cloud. Individual users must install the Oracle Sales Cloud for Gmail extension side panel themselves.

• A synchronization process that you run in Oracle Sales Cloud to keep contacts and calendar appointment synchronized.

The following figure shows how the two parts of the Oracle Sales Cloud for Gmail extension interact with Oracle Sales Cloud and Google Chrome.

• Changes users make in the side panel are reflected immediately in Oracle Sales Cloud. For example, when users share an e-mail or create a contact or an appointment in the side panel, Oracle Sales Cloud is updated immediately using web services.
• Changes to Google Contacts and Calendar must be synchronized by the process.

The synchronization process copies over to Google the latest contact and calendar information for the set of contacts and activities specified in a list (saved search) of contacts and activities in Oracle Sales Cloud.
How the Extension Works

The Oracle Sales Cloud for Gmail extension side panel appears whenever you open an e-mail or a calendar appointment in Chrome. The following figure shows a screen capture of what the side panel looks like for an e-mail. The side panel works very much the same way for appointments.

Callouts described in the following table highlight different features of the panel in the figure.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Feature Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Information about the e-mail sender (or appointment attendee) is displayed in the panel if the sender is a known contact.</td>
</tr>
<tr>
<td>2</td>
<td>The sender and the recipients (or attendees) are represented as tabs on the panel. If the sender or other recipients (or attendees) are contacts in Oracle Sales Cloud, the tab displays their initials. Clicking the tab with the initials displays the contact information from Sales Cloud.</td>
</tr>
<tr>
<td>3</td>
<td>If a recipient or attendee is not a contact, then the side panel displays a person icon on the tab instead of the initials. You can click the tab to create the contact.</td>
</tr>
<tr>
<td>4</td>
<td>Clicking Share, the envelope icon (calendar icon for appointments), shares the e-mail thread (or appointment) with individual accounts, contacts, opportunities, and leads. You can share e-mail attachments of up to 10 Mbytes in size.</td>
</tr>
</tbody>
</table>
To view the shared e-mails in Oracle Sales Cloud, you click the Activities tab, select as a **Completed Activities**, and look for activities of type **E-mail**. (While e-mails are all completed activities; calendar appointments are open activities until the appointment is over.)

The following figure shows a screen capture of the Activities tab on the Edit Account page. Similar tabs are available for contacts, opportunities, and leads. The table lists the callouts highlighting the different UI features.

<table>
<thead>
<tr>
<th>Callout Number</th>
<th>Feature Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Activities tab icon</td>
</tr>
<tr>
<td>2</td>
<td>The Show list, which you can use to display open or completed activities.</td>
</tr>
<tr>
<td>3</td>
<td>The Activity type.</td>
</tr>
</tbody>
</table>
Users drill down to view the e-mail text and any attachment. The following figure shows a screen capture of a sample shared e-mail.

Contacts synchronized from Oracle Sales Cloud appear in Google Contacts as a separate list under My Contacts. The following figure shows a screen capture of a sample Contacts page with the location of the list highlighted by a callout.
Turning On the Synchronization of Contacts and Calendar Appointments

You must set the Gmail Appointment Synchronization Enabled and Gmail Contact Synchronization Enabled system profile options to enable the synchronization of contacts and calendar appointments between Oracle Sales Cloud and Gmail. To set the two system profile options, do the following:

1. Sign in as a setup user and open the Manage Administrator Profile Values task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area.

   The Manage Administrator Profile Values page appears.

2. In the Search: Profile Option region, Profile Display Name field, enter %Gmail% to search for all of the Gmail profile options.

3. Click Search.

   The page displays the two profile options in the search results:
   
   - Gmail Appointment Synchronization Enabled
   - Gmail Contact Synchronization Enabled

4. Select each of the profile options and set their Profile Value to Yes.

5. Click Save and Close.
Running the Contact and Activity Synchronization Process

You must run the Synchronization Between Sales Cloud and Gmail process on a frequent schedule to ensure contacts and activities are synchronized. Individual users can specify which contacts and activities they want synchronized by selecting one of the lists (saved searches) available in the Contact and Activities work areas.

Running the Synchronization Process

To schedule the synchronization process:

1. While signed in as a setup user, open the Synchronization Between Sales Cloud and Gmail task from the implementation project. Alternatively, you can:
   a. Click the Navigator icon, and click Scheduled Processes under the Tools heading.
   c. On the Schedule New Process dialog box, select Job as the Type.
   d. Click the Name list and click Search.
   e. Search for Synchronization Between Sales Cloud and Gmail.
   f. Select Synchronization Between Sales Cloud and Gmail and click OK.
   g. On the Schedule New Process dialog box, click OK.

   The Process Details window appears. The following figure shows a screen capture of the window.

   ![](process_details.png)

2. Click the Advanced button.
3. On the Schedule tab, select Using a Schedule.
4. Select the frequency in which you want the process to run.

   Set the synchronization frequency to an interval no shorter than five minutes to ensure that all records are processed. If the data volume is low (fewer than 200 records updated in Oracle Sales Cloud and Gmail together), then set the frequency to five minutes. If the data volume is high (more than 1000 records updated in Oracle Sales Cloud and Gmail together), then set a frequency of 30 minutes.

5. Select the start and end dates.
6. Click Submit.

The job is now scheduled and synchronization takes place based on the frequency that you selected.
Specifying which Records to Synchronize

By default, the application synchronizes all the contacts in the My Favorite Contacts list (all of the contacts that a user marks as favorite) and all the activities in the All Open Activities list (all the open appointments where the user is listed as a resource).

Optionally, individual users can select different lists (saved searches) to synchronize. You select a different list as follows:

1. In the Oracle Sales Cloud for Gmail extension side panel, click **Settings**.
2. Click **Connection Settings** and select either **Activity synchronized settings** or **Contact synchronized settings** from the list.

This table lists the callouts on the side panel screen capture which follows.

<table>
<thead>
<tr>
<th>Callout</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Settings</td>
</tr>
<tr>
<td>2</td>
<td>Connection Settings</td>
</tr>
</tbody>
</table>

The following figure shows a screen capture of the side panel showing connection settings.

3. Click the Saves Search heading to view the available lists and select a list.
The following figure shows the side panel with the location of the Saved Search heading and the list, highlighted by callout 3.

Oracle provides the following alternate lists of contacts to choose from. There are no alternate preconfigured lists available for activities.

<table>
<thead>
<tr>
<th>Saved Search</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Contacts</td>
<td>All contacts in Oracle Sales Cloud.</td>
</tr>
<tr>
<td>My Business Contacts</td>
<td>All contacts belonging to all the accounts you own.</td>
</tr>
<tr>
<td>My Contacts</td>
<td>All contacts that you own.</td>
</tr>
</tbody>
</table>

Individual users can create their own lists or administrators can create lists for the whole organization. See the Customizing Work Area Lists topic in the Oracle Sales Cloud Customizing Sales guide for details.

**Installing the Oracle Sales Cloud for Gmail Extension**

Use the following procedure to install the Oracle Sales Cloud for Gmail Chrome extension from the Chrome web store and connect to Oracle Sales Cloud.
Installing the Extension
Use these steps to install the extension. You must use the link provided on My Oracle Support to install the extension. You cannot search for the extension by name in the web store.

2. Search for document Oracle Sales Cloud for Gmail Chrome Extension (Doc ID 2188228.1).
3. Click the link in the Details section.

The Oracle Sales Cloud for Gmail window opens in the Chrome web store.

4. Click ADD TO CHROME.
5. Click Allow when prompted to allow access to e-mails, calendars, and contacts.

The Oracle Sales Cloud for Gmail extension appears as a side panel when you open an e-mail or a Calendar appointment.

Note: If you installed the extension after signing in to your Gmail, you must refresh the page for the Oracle Sales Cloud for Gmail side panel to appear.

Connecting the Extension to Oracle Sales Cloud
Use the following steps to connect the extension to Oracle Sales Cloud.

1. Sign in to Gmail and open an e-mail or an appointment in the calendar.
2. Click the **Settings** icon on the side panel (highlighted by callout 1 in the following figure).

![Oracle Sales Cloud Configuration Panel](image)

3. In the Connection Settings section, enter:
   - The host name.
     - The host name is the portion of the Oracle Sales Cloud URL starting with `https://` and ending before `/sales`. For example, in the URL `https://vision.com/sales/faces/FuseOverview`, the host is `https://vision.com`. To obtain the host name, sign in to Oracle Sales Cloud and navigate to any of the sales work areas.
   - The Oracle Sales Cloud user name.
   - The password associated with the user name.

4. Click **Sign in**.

*Note:* You can only associate each Oracle Sales Cloud user with one Gmail e-mail address. After you connect for the first time, you must retain the same Gmail address for the user.
Setting Up Microsoft Outlook

Overview of Oracle Sales Cloud for Outlook

The Oracle Sales Cloud for Outlook application helps maximize sales productivity by providing your sales application capabilities directly within Microsoft Outlook, thereby allowing sales professionals access to essential sales application data.

Summary of Features

The following table lists the key features of Oracle Sales Cloud for Outlook.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales application capabilities within Microsoft Outlook</td>
<td>Using Oracle Sales Cloud for Outlook, all emails, calendar events, and tasks can be linked to the respective contact, customer, lead, or opportunity within your sales application. Sales professionals can access and update customer and sales information within Microsoft Outlook.</td>
</tr>
<tr>
<td>Single-click sharing between Microsoft Outlook and your sales application</td>
<td>When sending a meeting invitation or an email, or when setting up a task, a single click captures the action and updates of your sales application in the background.</td>
</tr>
<tr>
<td>Synchronization of data between your sales application and Microsoft Outlook</td>
<td>Two-way data synchronization allows sales professionals to have a continuously updated and accurate 360-degree view of data changes.</td>
</tr>
<tr>
<td>Synchronization Control Panel</td>
<td>Oracle Sales Cloud for Outlook provides synchronization filtering capabilities, enabling sales professionals to synchronize only the most critical data from your sales application. Sales professionals can synchronize high-priority accounts or opportunities closing this quarter, instead of synchronizing the entire data set from your sales application.</td>
</tr>
<tr>
<td>Offline access</td>
<td>The transition between online and offline modes of operation allows sales professionals in the field to use the full functionality of the product in an offline mode, and then synchronize the sales data in the next synchronization cycle.</td>
</tr>
<tr>
<td>User-defined configuration for Oracle Sales Cloud for Outlook</td>
<td>Configure how a page looks, using Oracle Sales Cloud for Outlook’s user-defined objects, fields, and User Interface layout options. For example, user-defined objects or objects that you rely on can be added to the application to cater to specific organizational or user requirements.</td>
</tr>
</tbody>
</table>

Overview of Oracle Sales Cloud for Outlook Installation

This topic provides an overview of how to install Oracle Sales Cloud for Outlook manually on each laptop or PC along with the prerequisite steps.
Before installing Oracle Sales Cloud for Outlook, ensure the following:

- Microsoft Outlook is installed on the laptop or PC.
- An existing Microsoft Outlook profile is available for use with Oracle Sales Cloud for Outlook, or a new Microsoft Outlook profile has been created.
- The user performing the installation is a sales application user provisioned with either the Sales Representative or the Sales Manager job role, but not both.
- All the system requirements are met. See the System Requirements page for details.

The installation steps include downloading the installer file, running the InstallShield Wizard, and entering your cloud service information if it’s not already set up.

Related Topics

- System Requirements for Oracle Applications Cloud

Installing the Oracle Sales Cloud for Outlook Application

This topic explains the prerequisites and steps to install the Oracle Sales Cloud for Outlook application on a laptop or PC.

Downloading Oracle Sales Cloud for Outlook Installer File

To download the Oracle Sales Cloud for Outlook installer file:

1. Sign in as either a sales manager or a sales representative, and select the Personalization menu, and then select the Set Preferences menu item.
2. Select CRM for Microsoft Outlook Installer under the Preferences pane.
3. Click Start Download to download the installer for either the 32 Bit or 64 Bit option, based on your Microsoft Outlook configuration.

Running the InstallShield Wizard

To run the InstallShield wizard:

1. Navigate to the downloaded installer file, unzip the file, and double-click the .msi file to start the installation.
2. On the Welcome page of the InstallShield Wizard, click Next.
3. On the Destination Folder page, check the default folder that will be created in the installation. If you want to use a different folder, then click Change.
4. When you have confirmed or selected a folder on the Destination Folder page, click Next.
5. On the Ready to Install the Program page, click Install.

Entering the Server Connection Information

To enter the connection information:

1. After the InstallShield wizard completes, open Microsoft Outlook.
2. On the Choose Profile page, choose the Microsoft Outlook profile that you want to use with Oracle Sales Cloud for Outlook, then click **OK**.

3. On the message asking if you want to install the application using the profile you selected in step 2, click **Yes**.

4. When the Oracle Sales Cloud for Outlook First Run Assistant pane appears, click anywhere in the Assistant pane to display the Login page.

5. In the Login page, enter your user information and the server information.

   The server information may be set up by default based on your administrator settings.

6. Click **Login** to complete the installation.

7. Once the configuration is complete, set the synchronization filters and start the synchronization.

   For more details on installing and administering Oracle Sales Cloud for Outlook, see the Deploying Sales for Outlook guide on docs.oracle.com.

**Related Topics**

- System Requirements for Oracle Applications Cloud
Chapter 24  
Setting Up Mobile Applications

About Setting Up Mobile Applications

Oracle Applications Cloud offers the following mobile applications that integrate with Oracle Sales Cloud: Oracle CX Cloud Mobile, Oracle Sales Cloud Mobile, and Oracle Mobilytics. This chapter outlines the capabilities of these applications, and provides installation and setup information.

Oracle CX Cloud Mobile

Oracle CX Cloud Mobile: Overview

The Oracle CX Cloud Mobile (CX Cloud Mobile) application enables field sales representatives, channel account managers, and partner representatives to manage their day effectively and develop customer relationships using a smartphone. With a task-based user interface and built-in analytics, the CX Cloud Mobile application guides daily sales activities and enables the following activities for sales representatives:

- **Use Offline**
  - View and edit Oracle Sales Cloud data in areas with no network connection
  - Sync automatically when a connection re-established

- **Configure the Application**
  - Configure your application using a drop and drop interface designer
  - Add, remove, and reorder standard or custom fields
  - Create layouts based on sales roles

- **Navigate Using Voice**
  - Find any sales record with a simple command from anywhere in the application. For example, say, "Open Account Pinnacle Technologies"

- **View Customer Service Requests**
  - View, create, and edit service requests
  - Access related information such as team, message, and attachments
  - View service request interactions and milestone history

- **Manage Partner Relationships**
  - Submit and approve deal registrations
  - Manage partners and partner contacts
Installing the iPhone Application: Procedure

This procedure shows you how to install the Oracle CX Cloud Mobile application on your iPhone.

1. Open the App Store, search for Oracle CX Cloud Mobile application, and then tap **Install**.
2. Open the application. If you have received an application URL from your administrator, you can tap on the URL link to open the application. Alternatively, you can scan the QR code to launch the application.
3. Accept the Legal Terms.
4. If you have opened the application using the application URL or the QR code, the host name, port number, and SSL details will be populated automatically.

   If you opened the application after downloading it from the App Store, you must enter the host name your administrator has provided (or refer to the Finding Your Company’s Host URL: Worked Example topic).
5. Enter your sales application user name and password. You can tap **Save Password** to save this password.
6. Tap **Sign In**.

Installing the Android Application: Procedure

This procedure shows you how to install the Oracle CX Cloud Mobile application on your Android device.

1. Open the Google Play Store on your Android device.
2. Search for the Oracle CX Cloud Mobile application and tap **Install**.
3. Open the application. If you have got the application URL from your administrator, you can tap on the URL link to open the application. Alternatively, you can scan the QR code to launch the application.
4. Accept the Legal Terms.
5. If you have launched the application using the application URL, or the QR code, the host name will be populated automatically.

   If you have opened the application after downloading it from the Google Play Store you must enter the host name provided by your administrator (or refer to the Finding Your Company’s Host URL: Worked Example topic). Tap **Settings** to enter the host name.
6. Enter your sales application user name and password. You can tap **Save Password** to save this password.

Implementing Oracle CX Cloud Mobile: Overview

Here is a summary of the steps required to roll out the Oracle CX Cloud Mobile (CX Cloud Mobile) at your organization:

1. If you are modifying CX Cloud Mobile for your organization’s particular requirements, you need to set the **ZMS_DISABLE_OSCM** profile option to **ENABLED**. Setting the profile option will enable the new mobile interface designer in Application Composer. For more details about navigating to profile options, see the topic that explains how to access predefined profile options.

   To modify CX Cloud Mobile using the new mobile interface designer first enable a sandbox, then navigate to Application Composer, select the Sales application, and click **Mobile Application Setup**. Using the mobile interface designer you can configure the application pages, such as moving objects and fields that you want to make visible onto the on-screen smartphone, create your own page layouts, and define which roles can view your page layouts. For more details about modifying CX Cloud Mobile, see the topic called Configuring Oracle CX Cloud Mobile: Explained.
3. You can add Oracle Business Intelligence reports to CX Cloud Mobile, so that your sales team can view the reports directly in the application. See the topic called Adding Oracle Business Intelligence Reports to a Feature’s Analytics Tab: Procedure for more details.

4. You can enable Oracle Social Network (OSN) so that your users can share Oracle Sales Cloud object records to OSN. See the topic called How can I set up Oracle Social Network for Oracle CX Cloud Mobile for more details.

5. You can also enable the voice feature by setting the ZMS_MOBILE_VOICE Profile Option value to ENABLED.

6. It’s recommended that you create a URL that automatically populates the host, port number, and SSO and SSL settings for your users. When users access the URL, CX Cloud Mobile will open with the applicable settings already populated. For details about how to create the URL, see the topic called How can I automatically populate the host, port number, and SSO and SSL setting for Oracle CX Cloud Mobile users?

7. Distribute the installation instructions and the URL you created in step 5 to your users. You can use the installation instructions outlined in the following topics: Installing the Oracle CX Cloud Mobile iPhone Application: Procedure and Installing the Oracle CX Cloud Android Application: Procedure.

Related Topics
- How can I access predefined profile options
- Adding Oracle Business Intelligence Reports to a Feature’s Analytics Tab: Procedure
- How can I set up Oracle Social Network for Oracle CX Cloud Mobile

Finding Your Company’s Host URL: Worked Example

This topic shows how to determine the host URL value for iPhone and Android devices. When signing in to the Oracle CX Cloud Mobile (CX Cloud Mobile) application, users must enter a host URL that specifies the Oracle Sales Cloud server location. The URL can be entered manually by the user, or you can create a URL that will automatically populate the host name, port number, and enable SSL (refer to the How can I automatically populate the host and port information for CX Cloud Mobile users topic for more details).

Determining the Host URL for iPhone and Android Devices

1. Sign in to Oracle Sales Cloud and select Navigator and then Application Composer.
2. Copy the host name portion of the URL that’s in your browser’s address bar. The host name is the part between https:// and the next slash (/). For example, the host URL might be something like: fapxxxx-crm.oracleads.com.
3. If users are entering the Host URL manually, then inform your users of the host URL value, so that they can use it when they sign into the application.

How can I automatically populate the host, port number, SSO and SSL setting for users?

Create a URL to distribute to your users, as follows:

1. To automatically populate the host URL, create the following URL: oscm://?host=<host value>. For example, oscm://?host=uscdrmovm44-crm-ext.us.oracle.com
2. To automatically populate the host URL and SSO setting, create the following URL: oscm://?host=<host value>&useSSO=<true/false>. For example, oscm://?host=uscdrmovm44-crm-ext.us.oracle.com&useSSO=true
3. To automatically populate the host URL, port number, and SSL setting in the Advanced Settings, create the following URL: oscm://?host=<host value>&port=<port value>&useSSL=<true/false>. For example: oscm://?host=uscdrmovm44-crm-ext.us.oracle.com&port=10616&useSSL=true
Distribute the formatted URL to your users, using e-mail or some other suitable communication method. When users access the URL, Oracle CX Cloud Mobile will open with the applicable settings already populated.

**Note:** Refer to the topic called Finding Your Company's Host URL: Worked Example to find the host name.

### Configuring Oracle CX Cloud Mobile: Explained
You can configure the Oracle CX Cloud Mobile iPhone and Android applications for your organization's particular requirements using Application Composer. Using Application Composer, you can manage which objects and fields are visible on the Oracle CX Cloud Mobile application, without having to carry out specific configurations for a particular device.

Before starting your configurations, you will need to set the `ZMS_DISABLE_OSCM` profile option to `ENABLED`. Setting the profile option will enable the new mobile interface designer in Application Composer. For more information about profile options, see the profile options chapter in the Implementing Sales guide.

### Creating a Page Layout for a Feature
You can create a List, Detail, or Edit page layout for a Oracle CX Cloud Mobile feature. Creating your own layout enables you to select the fields your users will see for a feature’s views. See the Creating a Page Layout for a Feature: Procedure topic for details about how to create a page layout.

When you create a page layout, you can add, remove, move, and change a field’s display format using the mobile interface designer. Find out more information about using the mobile interface designer in the following FAQs:

- How can I add a field to a feature’s page layout?
- How can I delete a field in a feature’s page layout?
- How can I move a field in a feature’s page layout?
- How can I edit a field’s display format in a feature’s page layout?
- How can I hide or display user actions for a feature?

### Adding a Role to a Page Layout
You can add a role to an application feature’s List, Detail, or Edit layout. For example, a user with the Sales Manager role might want to see certain fields on an opportunity detail record that other sales team members won’t need. See the Adding a Role to a Layout: Worked Example topic for details about adding a role.

### Creating Criteria for a Page Layout
You can create criteria to define a set of conditions that have to be met before the page layout is displayed for a feature's Detail or Edit views. See the Creating Criteria for a Feature Page Layout: Procedure for step by step instructions.

### Adding Your Own Object to a Page Layout
You can add your own objects to your CX Cloud Mobile application, and add page layouts in the same way that you can with standard sales objects (or features, as they are known as in the Mobile Application Setup). See the Adding Your Own Object to a Page Layout: Procedure topic for more details.

### Assigning Geographical Regions to a Page Layout
You can assign geographical regions to a page layout, which will restrict a page layout’s availability to users from your selected set of geographical regions.
Other CX Cloud Mobile Configurations
You can configure the application in many other ways, such as creating saved searches and adding Oracle Business Intelligence reports to a feature’s Analytics tab. See the Oracle Sales Cloud Implementing Sales guide, or the Oracle Sales Cloud Extending Sales guide for more details.

Testing Configurations
After you have configured Oracle CX Cloud Mobile using Application Composer, you should test your configurations before distributing them to your user’s mobile devices. See the Testing Oracle CX Cloud Mobile Configurations: Worked Example topic for more details.

Related Topics
• Creating a Page Layout for a Feature: Procedure
• Adding a Role to a Layout: Worked Example
• Creating Criteria for a Feature’s Page Layout: Procedure
• Adding a Custom Object to a Page Layout: Procedure
• Testing Oracle CX Cloud Mobile Configurations: Worked Example

Oracle Sales Cloud Mobile

Oracle Sales Cloud Mobile: Overview
Use the Oracle Sales Cloud Mobile application to do the following tasks:
• Track and update sales information on your smartphone or tablet
• Keep up to date with sales activities in your enterprise while on the move

Tasks That You Can Do
The key features of Oracle Sales Cloud Mobile include the following:
• Application Home Page: From the application home page, you can access critical information when you’re in the field.
• Sales Account Management: You can access reference information, as well as current events about the customer while on the road.
• Opportunity Management: From the mobile opportunity management page, you can access current and critical information about your opportunities and share opportunity updates with your sales team.
• Lead Management: With access to open leads while on the road, you can act upon leads and reduce the sales cycle time.
• Calendar and Tasks: With these features, you can manage appointments and tasks on the road.
• Contacts: You can call or e-mail contacts from the Actions menu. The application displays a list of your key contacts by default, and you can search for all other contacts. E-mail Contact and Call Contact features are disabled for contacts who don’t want to be phoned or e-mailed
• Sales Analytics: You can access business intelligence reports from the home page. Analytics also are embedded contextually for each account that you view. The contextual reports include data on sales account revenue trends, sales account win/loss trends, and sales account win/loss reasons.

• Alerts: You receive alerts when new leads are assigned or opportunities of interest become available.

Prerequisites
Before implementing Sales Cloud Mobile, you must:

• You must set up Oracle Sales Cloud before you can use Sales Mobile.

• Determine if your mobile device meets Sales Mobile system requirements. See the System Requirements for Oracle Applications Cloud here: http://www.oracle.com/us/products/system-requirements/overview/index.html

Related Topics
• How can I navigate within the Oracle Sales Cloud Mobile client

Finding Your Company's Host URL for Oracle Sales Cloud Mobile: Worked Example
This topic shows how to determine the host URL value for iPhone and Android devices. When signing in to Oracle Sales Cloud Mobile, you must enter a Host URL that specifies the Oracle Sales Cloud server location.

Determining the Host URL for iPhone and Android Devices
Perform these steps to determine the Host URL for iPhone and Android devices.

1. Sign in to Oracle Sales Cloud, and select Navigator and then Application Composer.
2. Copy the host name portion of the URL that's in your browser's address bar. The host name is the part between https:// and the next slash (/). For example, the host URL might be something like: fapxxxx-crm.oracleads.com.
3. Inform your users of the Host URL value so that they can use it when they sign in to the application.

Installing the Oracle Sales Cloud Mobile iPhone Application: Procedure
This procedure shows you how to install Oracle Sales Cloud Mobile on your iPhone.

1. Use your iPhone to sign in to iTunes and access the App Store.
2. Search for Oracle Sales Cloud Mobile and then tap Install.
3. Enter the host URL that your administrator has provided.
4. Enter your user name and password.
5. Sign in to the Oracle Sales Cloud Mobile application.
Installing the Oracle Sales Cloud Mobile Android Application: Worked Example

This example shows you how to install the Oracle Sales Cloud Mobile application on an Android device.

1. Use your Android device to sign in to Google Play, then browse the Apps.
2. Search for Oracle Sales Cloud Mobile and then tap Install.
3. Enter the host details that your administrator provided.
4. Open the Oracle Sales Cloud Mobile application, and enter your user name and password.
5. Sign in to the Oracle Sales Cloud Mobile application.

Configuring Your Mobile Springboard

You can add or remove object icons from the Sales Cloud Mobile application as follows:

Adding or Removing object icons

1. Within Application Composer, choose Sales from the Applications menu.
2. Open the Mobile Application Setup page, either by clicking the page link in the Common Setup menu, or by clicking the page link in the Overview section of the Application Composer page.
3. Click Configure Springboard.
4. Select the object you want to add or remove, and click the arrows pointing toward the right or left, moving the object to the Available list, or Selected list.
5. Click Save and Close.

Enabling Automatic Password Save on Mobile Devices

You can enable or disable automatic password saving on smartphones and tablets as follows:

1. Navigate to the Setup and Maintenance work area.
2. Search for the Manage Administrator Profile Values task.
3. Click the task name link in the search results.
4. In the Profile Display Name field, enter Password Save on Phone Enabled, then click Search.
5. In the Profile Values region, select the Mobile Sales line, and enter either Y (to enable) or N (to disable) password saving.

Note: If you sign out of the application the password will need to be re-entered again.

How can I automatically populate the host and port information for Oracle Sales Cloud Mobile users?

You can create a URL that will automatically populate the host name, port number, and enable SSL, by using the following URL template: osc://?host=[host name]&port=[port number]&useSSL=[true or false]. After host= enter the host name,
after `port=` enter the port number, and after `ssl=` enter whether you want SSL enabled. Here is an example of a URL: `osc://?host=abc.us.oracle.com&port=123&useSSL=false`.

Distribute the URL to your users. When users access the URL from their smartphone, the Sales Cloud Mobile application will open with the host name, port number, and SSL already populated or enabled.

⚠️ **Note:** Oracle Sales Cloud Mobile needs to have been downloaded onto the smartphone for the URL to work.
Glossary

**abstract role**
A description of a person’s function in the enterprise that is unrelated to the person’s job (position), such as employee, contingent worker, or line manager.

**catchall territory**
Sales territory with the value of Any in one or more territory dimensions. Catchall territories can be used for territory assignment troubleshooting.

**dimension**
A data category used to define territory boundaries, such as geography. Dimensions contain related dimension members usually organized in hierarchies. For example, a geography dimension often includes members, such as countries, and cities that belong to countries. Defined dimensions determine how to assign objects, such as customers, leads, and opportunities.

**field sales**
Sales representatives dedicated to working directly with their customers, often making presentations in person, to close deals.

**global header**
The uppermost region in the user interface that remains the same no matter which page you’re on.

**infolet**
A small, interactive widget on the home page that provides key information and actions for a specific area, for example social networking or your personal profile. Each infolet can have multiple views.

**inside sales**
Sales representatives dedicated to qualifying leads and contacting customers over the phone or e-mail.

**job role**
Job roles provide users with access to both the application functions they need to perform specific jobs in you organization as well as the permissions to access the data where they need to perform the job functions. Examples of job roles provided by Oracle include Sales Administrator, Sales Manager, and Sales Representative.

**LDAP**

**master catchall territory**
Sales territory with the value of Any for all the territory dimensions, which can be used for territory assignment troubleshooting. You must include a master catchall territory in all sales territory hierarchies use for assignment.
**sandbox**
A testing environment that isolates untested code changes from the mainline environment so that these changes don’t affect the mainline metadata or other sandboxes.

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

**springboard**
The grid of icons on the home page that you can use to open pages.

**territory**
The jurisdiction of responsibility of a salesperson or sales manager over a set of customers. Territories serve as a basis for forecasting, quota, compensation, and analysis of sales performance.

**territory coverage**
A territory coverage is a set of boundaries that define what is included or excluded in the territory and what can be sold. Selected customers or partners can be selected to be included or excluded from the territory being defined. For example, sell all products in North America.

**territory freeze date**
The date after which forecasting stops accepting territory hierarchy changes for the scheduled forecast and forecasting activities can begin.

**territory owner**
Resource assigned to manage a territory and is typically accountable for the work objects, such as opportunities, that are within the boundaries of the territory.